



User Manual

The Power of Community

shelby**systems**

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Arena User Manual

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Welcome to Arena, the Power of Community

Arena is a church ministry system designed to empower your people and your ministries.

Arena achieves this by:

- An easy-to-use and centralized method for your members to contribute (financially and physically) to ministries
- Keeping accessible, accurate, thorough, and integrated member records
- Organizing records by levels and layers of grouping schemes
- Tracking members' physical and spiritual needs and activities
- Coordinating ministry events through promotions and Arena-managed websites
- Providing an effective means of personal and mass communication

This makes Arena a true ChMS product. It focuses on Communication, Coordination, Connection, and Creativity. Because the Arena philosophy is people oriented, it begins with the end in mind and not let people slip through the cracks. Open the front door wider and close the back door tight. Take advantage of every touch point with a “wow” experience. Arena empowers you to invest more of your time and talent in the calling, less in the managing. Arena puts the power at your fingertips.

Our Mission

Arena is a brand name of Shelby Systems, Inc. Shelby Systems, Inc. exists to supply the information technology tools needed to help ministries and other organizations around the world thrive.

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Manual Notes

This manual assumes your Arena Administrator has done all the necessary setup and customizing of respective features to fit the needs of your organization. If this manual speaks to a particular feature or function that is not available to you, see your Arena Administrator.

Our goal is for the documentation to be a resource for your organization's staff and volunteers. The Arena Training department is responsible for Arena documentation and we welcome your feedback! Please e-mail your comments and suggestions to training@arenachms.com.

Throughout the manual, the two different note types below are used:



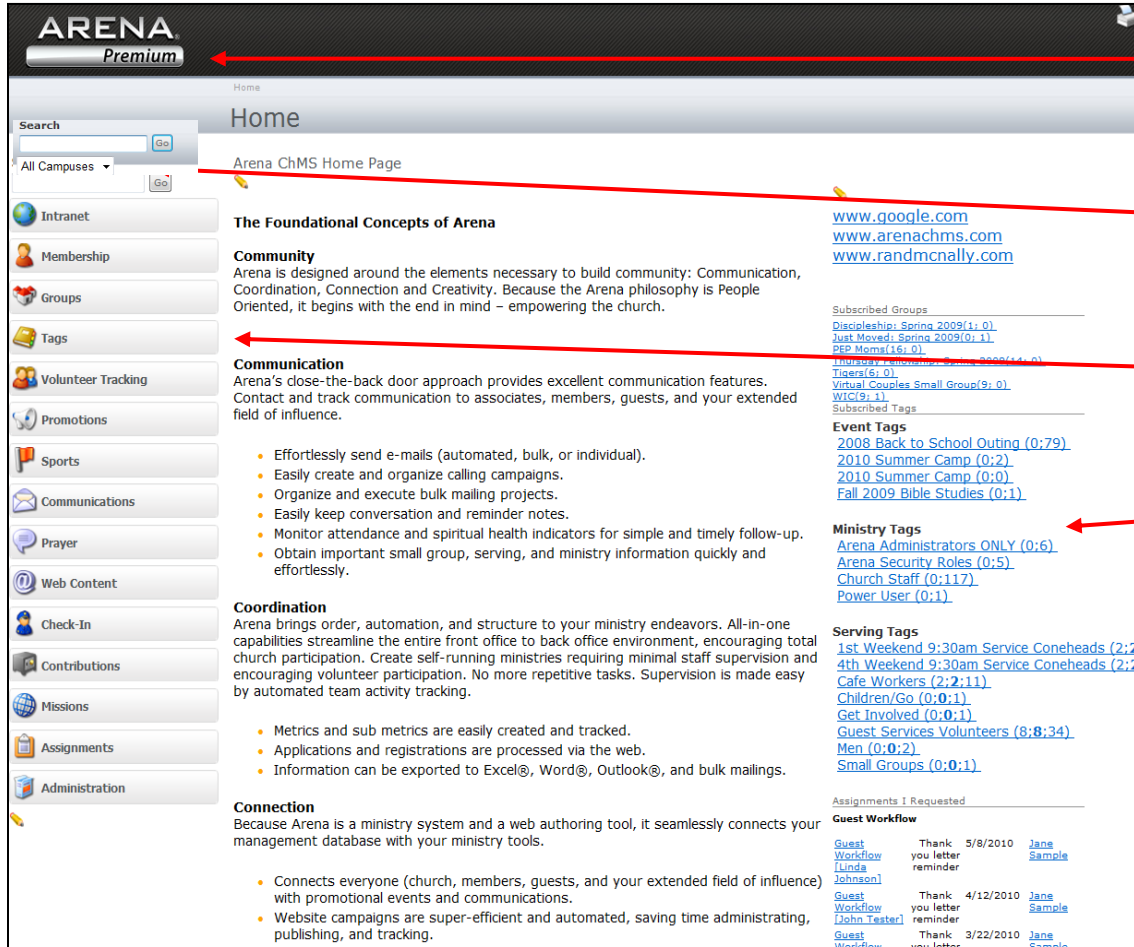
These notes denote additional information for the end user.



These notes denote tips for the end user.

Arena's home page consists of several navigation bars. Navigation bars are available to all users, but access to specific features may vary by user.

Arena Home Page



The screenshot shows the Arena Home Page interface. On the left is a vertical navigation bar with icons and labels for various features. At the top is a horizontal navigation bar. On the right side, four red boxes with arrows point to specific areas: 'Top Navigation Bar' points to the top header area; 'Filter by Campus (optional)' points to a dropdown menu; 'Left Navigation Bar' points to the vertical sidebar; and 'Right Navigation Bar' points to a column of links and tags on the right side of the main content area.

- **Top Navigation** – Click “Arena” in the top left corner of this navigation bar to return to the homepage.
- **Left Navigation** – Use this navigation bar to access the primary areas in Arena. *Feature access may vary by user.*
- **Right Navigation** – This navigation bar provides user-specific quick links to Tags, Groups and Assignments, using the subscribe option.



Quick Search

Quick Search allows you to quickly search for a person's record by first or last name, any part or combination of the first or last name, or person id. For easy access, this feature is available throughout Arena.

Steps to Find a Person's Record:

- 1) Go to **Quick Search**.

One Field Quick Search

- 2) Enter the **desired criteria** for the record to which you are searching.

- Typing a single word will search for last name or previous last name.
- Typing two words with a space will cause the first part to search for first name and the second part to search for last name.
- When entering a first name, Arena will search by First Name and Nickname. *For example, if you are searching for "Robert," it will also pull up all records with a nickname of "Bob" in the system.*
- Arena accepts wildcards. Use "**%**" in replace of several characters and "**_**" in replace of any single character. For example J%son, %son, and Johns_n.



- 3) Click the **Go** button or press **Enter** on the keyboard. *If the criteria you enter match a single record, the record will display. If the criteria you enter match several records, the multi-person results page will display, as shown below.*

Search Results

Name	Status	Campus	Gender	Age	Home Phone	Distance from Passage	Small Group	Class Level	Serving	E-Mail
Tester, Gary	Visitor	Main Campus	M	63	(901) 757-2372	323.79		-		
Tester, Jim	Visitor	Main Campus	M	59	(901) 757-2372	0.00	-	-		
Tester, Marie	Visitor	Main Campus	F	45	(901) 757-2372	323.79		-	-	
Test, Card	Member	Main Campus	M	36	(901) 772-7362	0.02	-	-	-	linda.johnson@arenachms.com



Page: 1 **2** 3 of 3 Page Size: 4 10 Member(s)

The result of your search will list all names that met the criteria specified on the search page. The Search Results page includes:

- Member Status
- Campus, if used
- Gender
- Age
- Home Phone
- Area, if used
- The Distance from the person's main/home address to your organization's address
- Small Group status (the Small Group icon  will display if in a small group)
- Class Level (used if your organization requires a specified class be attended prior to membership)
- Serving status (the Serving icon  will display if the person has a Serving Tag, E-mail address.
- Preferred e-mail, if available. Click the [e-mail link](#) to send an e-mail using your default e-mail application.

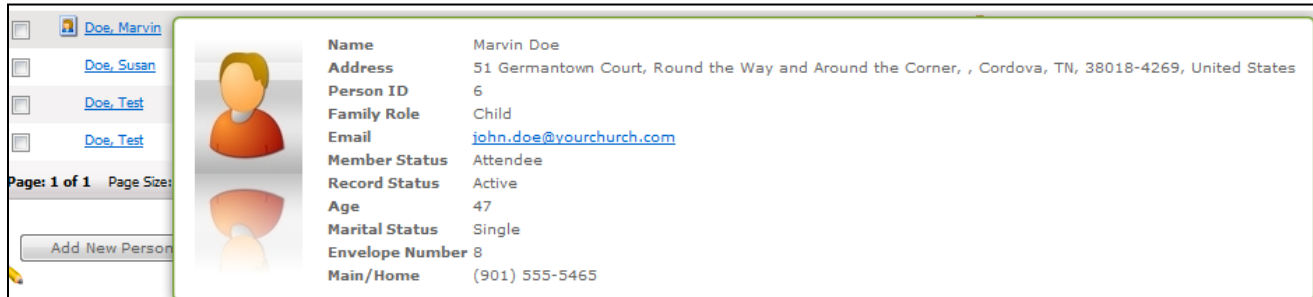


Active and Inactive records may display on the Search Results page. Inactive records are shaded in gray.

Click the heading of any column to sort by a single column. An Ascending  or Descending  icon displays to indicate your sort choice. Clicking multiple times will toggle between ascending and descending.

When you hover over a [name](#), as shown below, additional information will display in the person pop-up. *Displayed fields vary by organization and by user.*

Person Pop-up



The screenshot shows a web application interface. On the left, there is a list of names: "Doe, Marvin", "Doe, Susan", "Doe, Test", and "Doe, Test". Below this list, it says "Page: 1 of 1" and "Page Size:". At the bottom left, there is a button labeled "Add New Person". On the right, a pop-up window is displayed for "Doe, Marvin". The pop-up contains a profile picture of a man with orange hair and a red shirt. To the right of the picture, the following information is listed:

Name	Marvin Doe
Address	51 Germantown Court, Round the Way and Around the Corner, , Cordova, TN, 38018-4269, United States
Person ID	6
Family Role	Child
Email	john.doe@yourchurch.com
Member Status	Attendee
Record Status	Active
Age	47
Marital Status	Single
Envelope Number	8
Main/Home	(901) 555-5465

At the bottom of the Search Results page, the page size default is 20 names per page. You can change the page size to display a greater or lesser number of names.

To increase or decrease the number of records to display:

- 1) Enter the number in the **Page Size:** box.
- 2) Press **Enter** on the keyboard or click the **Refresh** button. *This changed view will apply to all other views for this user, until the Page Size is again changed.*

Page Size

<input type="checkbox"/>	Name	Status	Campus	Gender	Age	Home Phone	Distance from ArenaChMS	Small Group	Class Level	Serving	E-Mail
<input type="checkbox"/>	Sample, Jane	Member	Main Campus	F	43	(901) 757-2372	0.00		-		linda.johnson@arenachms.com
<input type="checkbox"/>	Sample, Johnny	Member	Main Campus	M	62	(901) 757-2372	0.00	-	-	-	johnsample@yahoo.com

Page: 1 of 1 Page Size: 5 Refresh 2 Member(s)

SELECTING RECORDS

You can select records by placing checkmarks in the boxes to the left of their [name](#) or select the box to the left on the **Name** column heading to select all records on the current page. Once you select the names, you can click one of the icons in the bottom right corner of the page.



- If you select no records, Arena selects all records across all pages.
- To select specific records, change the page size so all records display to select specific records.

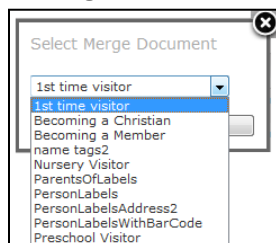
Record Selection

<input type="checkbox"/>	Name	Status	Campus	Gender	Age	Home Phone	Distance from Passage Community Church	Small Group	Class Level	Serving	E-Mail
<input checked="" type="checkbox"/>	Adams, Mike	member		M	31		4.91	-	-		
<input checked="" type="checkbox"/>	Alexander, Anita G	Member		F	49	(901) 372-1331			-		
<input type="checkbox"/>	Alley, Alvin	Member		M	38	(972) 662-5897	1.77		-		

Page: 1 2 3 4 5 6 7 8 9 10 of 25 Page Size: 3 Refresh 73 Member(s)

- The **Bulk Update** icon allows you to update all the selected records through Person Bulk Update.
- The **Merge Member** icon allows you to merge selected records into one record.
- The **Envelope** icon allows you to send e-mail to the selected names through Arena Communications.
- The **SMS Message** icon allows you to send an SMS Message to the selected names.
- The **Word** icon allows you to mail merge the selected names with an available document, as shown below.

Mail Merge



- The **Excel** icon allows you to export the selected names to Excel.



Membership

You can use Arena's Membership features to enter new individuals and families, or modify existing ones. You can view record details, relationships, and activity. You can also run active calling campaigns and reports, manage Background Checks and bulk mailings, and create lists.

White Pages

Using White Pages, you can search for a record campus, record status and any additional field.

APPLY CAMPUS OR RECORD STATUS

You can search by campus, if applicable, and by record status in addition to one advanced search field.

Advanced Search Options

Filter by Campus

☐ Include Inactive and Pending Records

ADVANCED SEARCH

Click Advanced Search to display additional search criteria options.

Advanced Search

Search:

By Name

First Name Last Name

Advanced Search



You can use the % and _ wild cards in these fields.

By Member Status

You can search for a group of people with a specific Member Status.

By Member Status

By Member Status

Member Status

By E-mail

You can search for a person by an e-mail address. You can enter any part of the e-mail address or the complete e-mail address. Example: *You can enter the domain, as shown below, or a complete email address.*

By E-mail

By Email	
Email	<input type="text" value="@gmail.com"/> <input type="button" value="Go..."/>



You can use the % and _ wild cards in these fields.

By Phone

You can search for a person by entering any part of the phone number or the complete phone number.

Example: *If you type '901', the search results display any record that contains these values (i.e., 623-901-0000 or 623-590-1423. To search for a specific area code in this example, enter 901%, as shown below.*

By Phone

By Phone	
Phone Number	<input type="text" value="901%"/> <input type="button" value="Go..."/>

By Address

You can search for a person by any part of the primary address. Example: *If you type 'rose' in the search field then the results will display people who live on Rose Garden, Rose Circle, or any address with 'rose' in it. Make note of abbreviated addresses such as Trc for Trace.*

By Address

By Address	
Address	<input type="text" value="Goodlett Farms"/> <input type="button" value="Go..."/>

By Proximity

You can search for people who have a home address located a specified distance from an entered address.

Example: *If you want a list of people who live within five miles of your organization or a group leader, then type "5" in the Proximity box and type the address of your organization in the address boxes. The results will show anyone who lives within five miles. If you want a list of people who are exactly ten miles, use the column sort options on the results page.*

By Proximity

By Proximity			
Proximity	<input type="text" value="5"/>	miles from address	<input type="text" value="7345 Goodlett Farms Parkway"/>
		City/State/Zip	<input type="text" value="Cordova"/> , <input type="text" value="TN"/> <input type="text" value="38016"/>

By Tags

You can search for a group of people by a Ministry, Serving, or Event Tag. Click the ellipsis icon to search and select a Tag.

By Tag

By Ministry Tag	
Ministry Tag (not set) ...	Go...
By Serving Tag	
Serving Tag (not set) ...	Go... <input checked="" type="checkbox"/> Only Connected
By Events	
Events (not set) ...	Go...

By Spiritual Gift

You can search for a group of people with a specific Spiritual Gift. Options vary by organization.


By Spiritual Gift

By Spiritual Gift	
Gift	Patience ▼
	Go...

By Birth date

You can search for a group of people by entering a birth date using the calendar or by typing in a birth date in MM/DD/YYYY or MM/DD format.

By Birth Date

By Birthdate	
Birthdate	<input type="text"/> 
	Go...

By Login ID and By Alternate ID

You can search for a group of people with a specific Login ID or Alternate ID.

By Login ID and Alternate ID

By Login ID	
Login ID	<input type="text"/> Go...
By Alternate ID	
Alternate ID	<input type="text"/> Go...

Records that meet the any single search criteria will display on a Search Results page, as shown previously. Click the [name](#) from the Search Results page to view a record.

Viewing a Record

A person's record consists of one page with several tabs. Security settings will determine which tabs display for each user.

Person Detail Tabs

Person Detail				
Individual Information	Security	Person Viewed	Contributions	Prayer Requests

INDIVIDUAL INFORMATION TAB

Person Information

This section displays demographic and system information for the current person. *Only populated fields display when not in edit mode.*

Personal Information

Personal Information		Edit
Person/Foreign ID:	372/0	
Member Status:	Member	
Record Status:	Active	
Campus:	None	
Staff Member:	Yes	
Name:	Mrs. Jane (Janie) Marie Sample	
Previous Last Name(s):	Smith	
Birth Date:	10/3/1966	
Gender:	Female	
Marital Status:	Married	
Anniversary Date:	9/22/2001 (8 Years)	
Medical Info:	peanuts	
Date Added:	5/20/2010	
Date Modified:	5/20/2010	
Date Last Verified:	5/20/2010 Verify	

- Person ID/Foreign ID (Foreign ID = Shelby Name ID if synchronized with Shelby Systems v5 software)
- SSN (Encrypts the first 5 digits)
- Member Status
- Record Status
- Campus, if available
- Staff Member
- First, Middle, Nick and Last Name
- Previous Last Name, if applicable
- Birth Date
- Age (Listed in years/months/days)
- Gender
- Marital Status
- Anniversary Date (Wedding Anniversary)
- Medical Info
- Date Added (to Arena)
- Date Modified
- Date Last Verified (Click the [Verify](#) link to update to confirm the record is correct.

Family Information

This section lists a person's spouse and/or children, their family role and membership status.


Family Information

Sample Family: Edit		
Everett Sample	Adult	Member
 Marie Sample:	Adult	Member
Pete Sample:	Child	Member
Kate Sample:	Child	Member

Relationships

The Relationship section allows your organization to recognize relationships outside of the immediate family.

Relationships

Relationships Edit	
John Sample:	Sibling-Brother
Betty Smith:	Can Checkin
 Johnny Doe:	Father



If your organization uses Arena Check-In, any **Relationship Type** containing the phrase "can checkin" (case insensitive, no quotes) will permit this action. ***If no Relationship Types exist, see your Arena Administrator.***

Steps to add a Relationship:

- 1) Click the Edit link for this section.
- 2) Click the [\[Select Person...\]](#) link to bring up the quick search pop-up window.

Adding a Relationship

Relationships		Edit
[Select Person...]	<input type="text"/>	Add
		Done

- 3) Search for an **existing** record.
- 4) Click the **box** to the left of the name.

Person Select

<input type="checkbox"/> Select	Name	Status	Campus	Gender	Age	Home Phone
<input checked="" type="checkbox"/>	Mission, Mandy	Member	Campus 1	F	10	
<div> Select Select and Search Again Add New Person Cancel </div>						

- 5) Click the Select button. *This will populate that name into the Name field in the Relationship section.*



- 6) Select a **Relationship** from the drop-down list.

Selecting a Relationship





John Tester	<input type="text"/>	Add
Peer Network	Grandchild Grandparent	Done View Details...

- 7) Click [Done](#). The inverse of this relationship will automatically display on the other person's record.

Peer Network

This section lists the names of persons, scores, and a trend up  icon or trend down  icon, which represents the most recent connection trends for the person with other existing records, as shown below. Click [View Details...](#) to view all connections to the person. Peer Network scoring is calculated based on the Relationship scale setting in Groups and Tags to which the people belong.

Peer Network

Peer Network	View Details...
Marvin Carter:	1,011 
Joshua Addams:	1,010 
George Jackson:	920 
George Callahan:	891 
Reggie Downs:	891 
Ethel Arnold:	800 
Bill Green:	763 
Laura Peterson:	763 
Shelly Marvin:	891 
Blake Farris:	891 

Contributions Information

This section contains default fields used for Contributions.

Contribution Information

Contribution Information	Edit
Last Contribution Date:	8/24/2010
Contribute Individually:	Yes
Print Statement:	No
Email Statement:	Yes
PIN Number:	****
Envelope Number:	11000

- **Last Contribution Date**—This is the date of the last processed contribution.
- **Contribute Individually**—Check this box to indicate if the person contributes individually. Leave blank if contributing with a spouse.
- **Print Statement**—Check this box to produce a printed contribution statement.
- **Email Statement**—Check this box to e-mail contribution statement.
- **PIN Number**—Enter a PIN number (up to 10 characters), to e-mail a Contribution statement.
- **Envelope Number**—Click [Assign](#) to automatically assign the next sequential envelop number. When initially assigning an envelope number, it has to be set to be included. Once you assign a number, you can uncheck the "Include on Envelope" checkbox.

Check-In

This section contains default fields used to record special information for this person you may need during Check-In.

Check-In

Check-In	Edit
Allergies:	Peanut Butter
Medical Situation:	Asthma
Potty Training:	just about there
Custody Situation:	None
Special Note:	Special Notes

Photo

This feature allows you to upload a single photo for this member. The photo sizes must be at least 200 x 200 pixels for the pictures to display properly.

Adding a New Photo

Photo
Update Photo...

Updating a Photo

Photo

Update Photo...

Steps to Add a Photo:

- 1) Click the **Update Photo...** link.
- 2) Click the **Browse** button.
- 3) Find the photo and click the **Upload** button to save.

Counseling

This section allows you to view counseling notes entered on the Counseling tab of the Person Detail page.

Counseling Summary

Pastoral Restrictions
Restricted From: All campus events Membership - Lists

Arena identifies records with an active Counseling note with the designated **[R]**.

Counseling Annotation

<input type="checkbox"/>	Name	Status
<input type="checkbox"/>	Smith, Adam	Member
<input type="checkbox"/>	Smith, Andrew	Member
<input type="checkbox"/>	Smith, Angela Joyce [R]	Member
<input type="checkbox"/>	Smith, Betty [R]	Member



Phones

This area shows the phone numbers for this person and those numbers with SMS available.

Phone Information

Phones		Edit
Main/Home:	Unlisted	
Business:	(888) 772-7362	
Cell:	(901) 453-2123	



The  icon indicates you can send an SMS (Short Message Service). If you click the  icon, a new Communication page opens.

Steps to Update or Add a Phone Number:

- 1) Click the **Edit** link for this section.
- 2) **Enter the phone number** in the first field, an extension number in the second field (if applicable), indicate if unlisted or is SMS capable, and select the SMS provider. *No formatting is necessary when entering 10-digit phone numbers. They will automatically format when you press Tab. You may want to format international numbers. If you select SMS, a provider is required.*

Edit or Add a Phone Number

Main/Home:	<input type="text" value="(901) 757-2372"/>	ext. <input type="text"/>	Unlisted <input checked="" type="checkbox"/>	SMS <input type="checkbox"/>
Business:	<input type="text" value="(888) 772-7362"/>	ext. <input type="text"/>	Unlisted <input type="checkbox"/>	SMS <input type="checkbox"/>
Cell:	<input type="text" value="(901) 453-2123"/>	ext. <input type="text"/>	Unlisted <input type="checkbox"/>	SMS <input checked="" type="checkbox"/>

- 3) Select **additional options**, as needed. *If you select and save an unlisted phone number, only users with the rights to view unlisted phone numbers be able to view the number(s). If you select Unlisted, only users with the associated permissions can view these numbers. If you select SMS, Arena will prompt you to select a provider.*
- 4) Click **Save**.

E-mail Addresses

This area shows e-mail addresses for this person.

E-mail Addresses

Emails	Edit
jane.sample@arenachms.com (work) (Preferred) (Bulk Email Allowed)	
jane@gmail.com (Bulk Email Not Allowed)	



- The e-mail address at the top of this section is marked as the Preferred. Use the “TOP” link to move any e-mail to the preferred position.
- E-mails you send using Arena Communications include all active e-mail addresses for the selected individuals.
- Bulk Email Allowed indicates if e-mail addresses should or should not be included in bulk emails.
See New Communications in this manual for more details.

Steps to Add or Edit E-mail Addresses:

Click **Edit** for this section. *The address in the first position is the preferred email address. Use the TOP icon to move an email address into the first position.*

Adding E-mails

	Email	Notes	Active	Allow Bulk Email
	jane.sample@arenachms.com	work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TOP	jane@gmail.com		<input checked="" type="checkbox"/>	<input type="checkbox"/>
TOP			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

note: some functionality is based on the preferred email

[Save](#) [Cancel](#)

- 1) Enter the **e-mail address**.
- 2) Enter **Notes**, if desired.
- 3) Select “**Active**” to indicate the e-mail address should be used.
- 4) Select **Allow Bulk Email** to indicate if this e-mail address should receive bulk e-mails.
- 5) Click **Save**.

Address/Previous Address

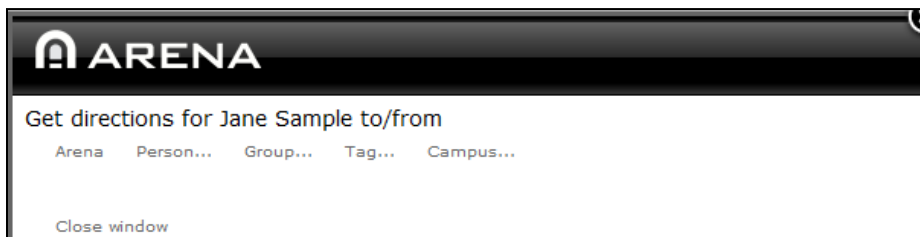
This area shows the Address for this person, any previous address, and his or her proximity to your organization (as defined by your Organization address).

Address Information

Addresses Edit	
Main/Home Address (Primary):	7345 Goodlett Farms Parkway
City/St/Zip:	Cordova, TN 38016
Lat/Long:	35.1799 -89.8173 Recalc
Proximity to Passage Community Church:	0.02 miles
Driving Directions:	Map Get Directions
Previous Address:	1740 Meadow River Cv
City/St/Zip:	Cordova, TN 38016-1603
Lat/Long:	35.1729 -89.7762 Recalc
Proximity to Passage Community Church:	2.39 miles
Driving Directions:	Map Get Directions

Click the [Map](#) link to open in a new window and allow you to get directions, via Google Maps, starting with the originating address. Click the [Get Directions](#) link to get directions, via Google Maps, from this person's address to the organization, an existing record, a group, a tag or a campus, as shown below.

Get Directions



Background Section

This section displays the information pertaining to a background check for this individual. *If permissions allow, you can also access existing background checks reports or initiate a new request.*

Background Checks			
Result	Type	Status Updated	Requested By
Rejected	Basic	6/22/2010	Bob Brown
Request New Background Check			

Activity Section

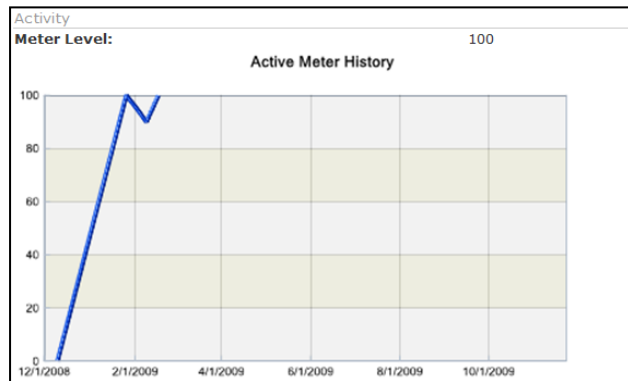
The activity meter level displays the quantitative value which represents the overall health of the person in your organization, with default maximum value being 100.

Activity	
Meter Level:	100

Activity Meter Level

The graph shows the activity level of the person over a period of one year.

Activity Meter



Area Information

This section shows the assigned geographical area for this person. To edit, click the Edit link in the top right corner of this section and select the desired area. *The person's address is not required to be within the Area's boundaries.*

Area

Area Information		Edit
Area:	Cordova	

Small Group Information

This section shows all Groups where the person is a member, leader or pending registrant. If the person is not in a Small Group then this area will display "Not in a Small Group."

Groups Information

Groups Information		Edit
Status:	In 3 Groups	
Women's Ministry \ Thursday Fellowship \ Thursday Fellowship (Member) Sunday School \ Couples \ Mixed Age Couples \ Virtual Couples Small Group (Member) ABF Groups \ New Group Collection \ Women's ABF Group (Leader) Leader of Women's Ministry \ Monthly Groups Pending Registration: Discipleship: Spring 2009		

Steps to Add Someone to a Group from the Person Detail Page:

- 1) Click **Edit**.
- 2) Select **Show All Groups**, if desired.
- 3) Select [Assign Groups...](#)

Groups Information

The screenshot shows a panel titled "Groups Information". It contains the following text: "Status: In 3 Small Groups", followed by a list of group names: "Testing Org \ New Level One \ New Group (Member)", "Add Registration Test (Memphis) \ Level 1 (Memphis) \ Small Group (Leader)", and "Kyle's Group (Memphis) \ 1st Group Collection \ Testing Group (Member)". Below this, it says "Pending Registration: Small Group". At the bottom, there is a checkbox labeled "Show All Groups" which is checked, and two links: "Assign Small Groups..." and "Done".

- 4) Select the **Group(s)**.

Group Browser

The screenshot shows a panel titled "Group Browser". It has a "Filter:" label above a text input field and a "Filter" button. Below this, it says "Arena Groups:". Underneath, there is a tree view showing a hierarchy: "Women's Ministry" (with a folder icon), "Discipleship" (with a folder icon), and "Discipleship: Spring 2009" (with a folder icon and a checked checkbox). A red arrow points to the "Discipleship: Spring 2009" entry.

- 5) Click **OK**. *Arena will add the record with the group role of Member.*

Event Tags

This section shows the Event Tags where this person is a registrant. You cannot add or edit registrations directly from this section. You can only add or edit registrations from the Event Tag itself. If the person is not a registrant for any Event, this area will not display.

Attended Events

General Events	Edit
Summer Camp	

Serving Tags, Personal Tags, and Ministry Tags

This section displays all tags the individual is a member of and their status. *When hovering over a Tag, the tag hierarchy will display.*

Serving, Personal and Ministry Tags

Serving Tags	Edit
Door Greeter	
Personal Tags	Edit
Ministry Tags	Edit
All Staff (In Process)	
Finance Committee (In Process)	
Church Committees > Finance Committee	

Serving Tags

This section shows all the Serving Tags this person is involved and their status. By hovering over any tag, the tag tree displays.

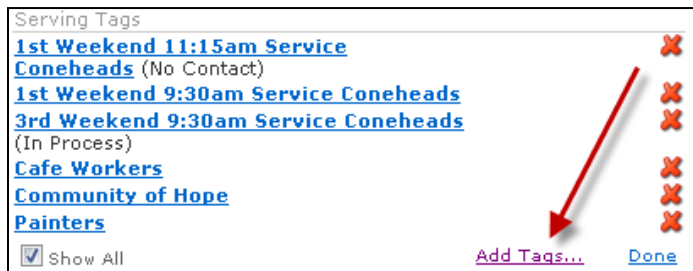
Serving Tags

Serving Tags	Edit
Door Greeter (Background Check Pending)	
Part-Time	
Church Employee Tags > Part-Time > Helpers > Door Greeter	
Personal Tags	Edit

Steps to Add Someone to a Personal, Serving or Ministry Tag from the Person Detail Page:

- 1) Click **Edit** for this section.
- 2) Select **Show All**, if desired.
- 3) Select [Add Tags...](#)

Add Tags



- 4) Select **Tag(s)**.

Selecting a Tag



- 5) Select **Status**.
- 6) Enter a **Note**, if desired.
- 7) Click OK.

Tag Status and Note

Volunteer Information

This section shows information needed for this person's Volunteer eligibility. To edit, click the **Edit** link in the top right corner of this section.

Volunteer Information		Edit
Name Tag Issued:	4/13/2009	
Volunteer Application:	9/22/2009	
Background Check:	11/1/2009	
Food Handler Card:	11/10/2009	

Member Path

This section shows key dates and information regarding the person's member path. To edit these, click the **Edit** link in the top right corner of this section.

Member Path		Edit
How Received:	Transfer	
Date Received:	11/4/2007	
Infant Baptist:	3/15/1967	
Member Of:	Church by the Way	
Source:	Friend	

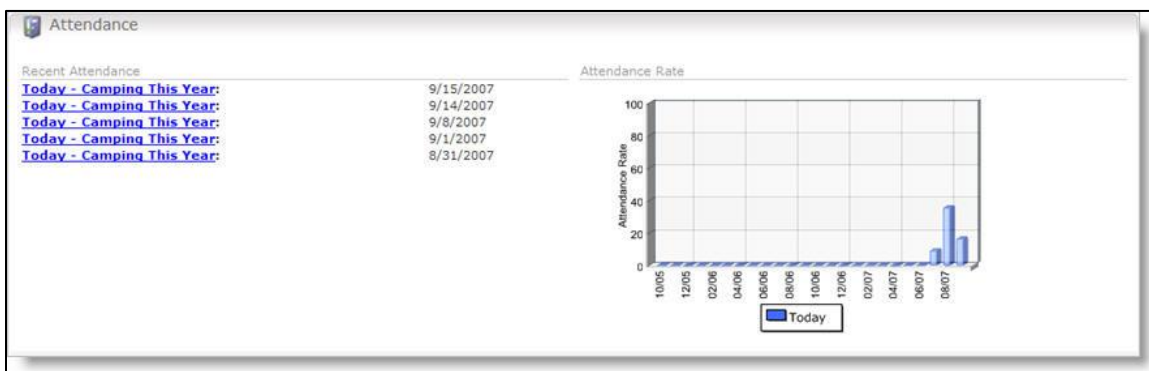
Visit Dates

This section shows visitation dates for this person. To edit, click the Edit link in the top right corner of this section.

Visit Dates		Edit
First Visit:	10/7/2007	
Second Visit:	10/14/2007	
Third Visit:	10/21/2007	

Attendance Section

The Recent Attendance area displays the last ten Group or Tag occurrences that the person has attended. Check-In Attendance Types that are marked for Weekend Service populate the **Attendance Rate** graph. *Occurrences are records of attendance using Check-In or manually in Tags or Groups.*



Notes Section

You can add notes to a person's record from this section. You can view the notes in this section and display the note at the top of the Person Detail page.

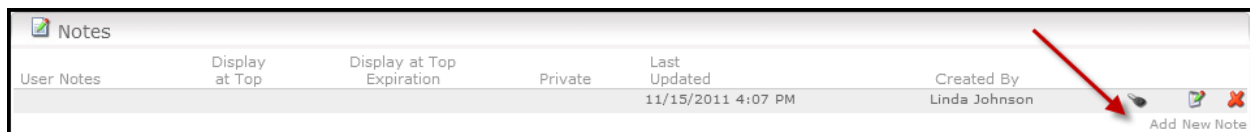
Notes						
User Notes	Display at Top	Display at Top Expiration	Private	Last Updated	Created By	
Private note--for me ONLY			✓	11/30/2009 8:30 PM	Linda Johnson	 
Private note--for Pastors ONLY			✓	11/30/2009 8:30 PM	Linda Johnson	 
She loves surprises.	✓	12/31/2009		10/9/2009 5:48 AM	Linda Johnson	 
Add New Note						

Note Checked to Display

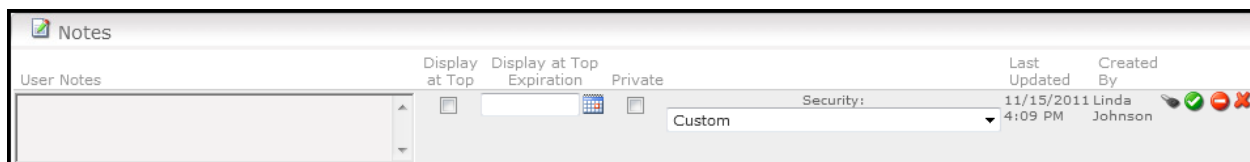



Steps to add a Note:

- 1) Search and select the record you wish to add a note.
- 2) Select Add New Note.



- 3) Enter the desired note, making any additional selections.

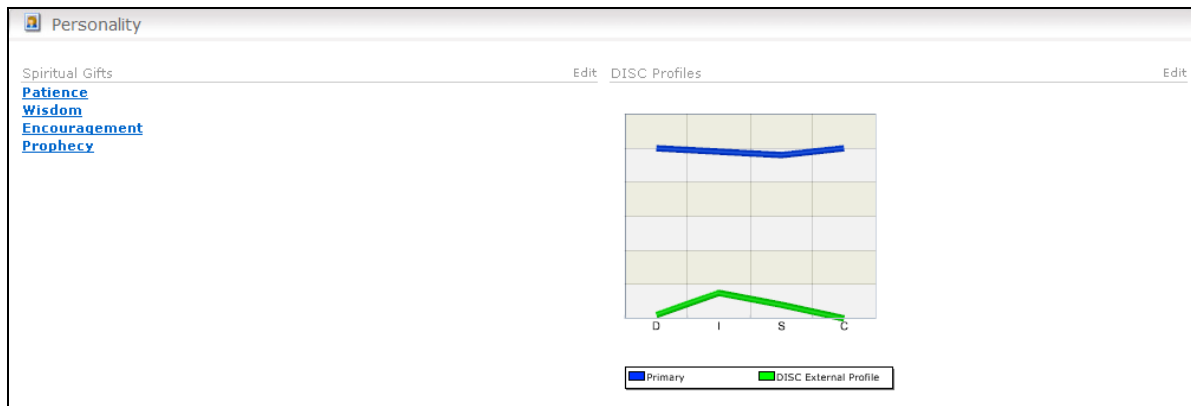


- Notes you check to **Display**, will display at the top left of the Person Detail page, above the Profile Section as well as in the note section. Displayed notes list in order, with the most recent note entry at the top of the list.
 - Notes you check **Private**, will only be available to the person who entered the note. *You can mark a note to display and private. In this case, only the current user will be able to view the displayed note.*
 - If available, you can assign access rights to a specific Security Template to view or edit your Note(s). *Permissions for Security Template are pre-determined.*
- 4) Click the save  icon.

Personality Section

Spiritual Gifts and DISC Profiles are both optional sections. Your organization will determine usage.

Personality Section



- **Spiritual Gifts** can be set up to show what gifts a person possesses. Clicking on the [gift](#) will display a list of the other members possessing the same gift.
- **DISC Profiles** use the DISC (Dominance, Influence, Steadiness, and Conscientiousness) profiling personality trait system. Several organizations offer this testing. Arena will track it for you if you choose to implement it. You can select Spiritual Gifts and you can enter DISC results on this page.

History Section

To view the person history, check the View History box on the right side of the page. This section lists all record activity such as individual information changes, sent e-mail and SMS messages, and changes with Groups and Tags. Each section has a drop-down box to view the last **5,100**, or **All** actions taken with this record. *Arena honors security for this section. For example, if a user does not have permission to view a field, the user will not have access in the history section, should the field be changed.*

History Section

History			<input checked="" type="checkbox"/> View History
Person Updates			Display: 5
Spiritual Gifts Updated To: Faith Leadership Encouragement...	7/12/2011 12:36 PM	Linda Johnson	
Email added: linda@gapsolutions.biz	7/12/2011 11:34 AM	Linda Johnson	
Test Phone Number added: '(901) 757-2372'	7/12/2011 11:32 AM	Linda Johnson	
Spiritual Gifts Updated To: Faith Leadership Encouragement...	5/3/2011 1:05 PM	Linda Johnson	
Business Number changed from '(901) 757-2372' to ''	5/3/2011 1:00 PM	Linda Johnson	
Person Attribute Updates			Display: 5
Sample Attribute with Previous Values (using Date) changed...	6/7/2011 5:51 PM	Linda Johnson	
Sample Attribute with Previous Values (using Date) changed...	6/7/2011 5:51 PM	Linda Johnson	
Favorite Vacation Spot changed from 'St. Martin' to...	4/28/2011 12:49 PM	Linda Johnson	
Favorite Vacation Spot changed from 'Unknown' to ''	4/27/2011 11:57 AM	Linda Johnson	
Serving Interest changed from 'Unknown' to 'Cafe'	4/6/2011 8:16 AM	Linda Johnson	

SECURITY TAB



Access to Tabs on the Person Detail Page may vary by user.

At the top of the Person Detail page, click the Security tab to display the Security logins for this person. To add any of these ID types, click the associated Add New ID icon and enter the required values.

Security Tab

Person Detail

Individual Information | **Security** | Person Viewed | Contributions | Prayer Requests

Arena Logins

Active	Login	Authentication Type	Last Login	Last Login IP		
✓	lindaj	Database	8/10/2011 7:15:47 PM	fe80::4ca4:307f		
✓	mariej	Database	7/8/2011 3:29:02 PM			

Page: 1 of 1 Page Size: 18 Refresh 2 Login(s)

Manager IDs:

Alternate ID

0922

Page: 1 of 1 Page Size: 18 Refresh 1 Alternate ID(s)

Family IDs:

Alternate ID

2201

Page: 1 of 1 Page Size: 18 Refresh 1 Alternate ID(s)

Person IDs:

Alternate ID

1003

Page: 1 of 1 Page Size: 18 Refresh 1 Alternate ID(s)



Alternate IDs should not start with an “R”, “C”, or “M”, as these are reserved for Check-Out.

PERSON VIEWS TAB

The Person Views tab displays the people who have viewed your record in the top section and the people you have viewed in the bottom section.

Person Viewed Tab

Individual Information


Security


Person Viewed

Contributions




Prayer Requests


Counseling




 People Who Have Viewed George

Name	Last Viewed	First Viewed	Times Viewed	Status	Gender	Age	Home Phone	E-Mail
Sample, George	11/16/2011	11/16/2011	1	WebProspect	F	45	(901) 123-4567	linda.johnson@arenahcms.com
 Johnson, Linda	11/16/2011	6/25/2011	23	Member	F	45	(865) 288-3669	linda.johnson@arenachms.com




Page: 1 of 1 Page Size: 45 2 Member(s)

 People George Viewed

Name	View Count	First Viewed	Times Viewed	Status	Gender	Age	Home Phone	E-Mail
Sample, George	11/16/2011	11/16/2011	1	WebProspect	F	45	(901) 123-4567	linda.johnson@arenahcms.com
Tester, John [R]	11/16/2011	11/16/2011	1	Member	M	36	(901) 789-4561	linda.johnson@arenachms.com
Arnoult, Lee	11/16/2011	11/16/2011	3	Member	M	70	(901) 861-2280	
 Coleman, Katie Mac	11/16/2011	11/16/2011	2	Child of A Member	F	10	(865) 523-4472	
 Clem, Laura	11/16/2011	11/16/2011	2	Member	F	43	(865) 288-0577	laura@clem.cc
 Sample, Linda	11/16/2011	11/16/2011	2	Member	F	45	(901) 757-2372	jane.sample@arenachms.com


Page: 1 of 1 Page Size: 45 6 Member(s)

PRAYER REQUESTS TAB

The Prayer Requests tab will display any prayer requests entered for this person.

Prayer Requests

Individual Information		Security	Person Viewed	Contributions	Prayer Requests	Counseling
Date	Request	Approved	Prayer Count	Source	Category	
1/27/2011	I would like to pray for Clarence to get his wings.	✓	2	Phone Call	General	
1/27/2011	My prayer is for Clarence to get his winds	✓	1	Friendship Card	God's Will	
Page: 1 of 1 Page Size: 45 <input type="button" value="Refresh"/> 2 Prayer Request(s) 						

- Click the prayer icon to add a new **Prayer Request** for this person.
- You can view **Prayers** for this person by clicking on the prayer [link](#).

Steps to Add a Prayer:

- 1) Click on the **Add New Prayer Request** icon.

Add New Prayer Request

Person Detail

Individual Information Security Person Viewed Contributions **Prayer Requests**

Date	Request	Approved	Prayer Count	Source	Category
There are no results to display.					

Page: 1 of 1 Page Size: 18 Refresh 0 Prayer Request(s)

Add New Prayer Request

- 2) Enter **First** and **Last Name**, if not automatically populated.
- 3) Enter **Email**, if not automatically populated.
- 4) Select a **Prayer Category**.
- 5) Check the **Request Response** box if the requestor would like to receive an email response.
- 6) Check the **Private** box if this prayer should only be available to prayer team members who have the permissions to view private prayers.
- 7) Select a **Content Category**. *This is applicable when entering prayers from the Arena-managed website.*
- 8) Select a **Source**. *This field is to identify the method of obtaining the prayer.*
- 9) Default **Status** is pending.
- 10) If you have permission, **Approve** the prayer. *See our Arena Administrator regarding various permission options for prayer.*
- 11) Enter the Expiration Date this prayer request should expire. *Renewal option is available.*
- 12) Enter the Prayer **Request**.

Prayer Details

Prayer Request Details

First Name Jack

Last Name Sample

Email

Prayer Category General

Request Response ☐

Private ☒

Person Jack Sample [Change...](#) [Remove](#)

Content Category Arena

Source Friendship Card

Status Pending

Approved ☐

Expiration Date

Request

- 13) Click **Save**.

CONTRIBUTIONS TAB

The Contributions tab on the Person Details page displays individual contribution information. The tab is broken into three sections: pledges, repeating payment profiles, and contribution history.

Contributions Tab

The screenshot shows the 'Person Detail' page with several tabs: 'Individual Information', 'Security', 'Person Viewed', 'Contributions' (which is highlighted), 'Prayer Requests', and 'Counseling'.

Pledges Section

Pledges entered from Pledge Quick Entry display in this section. *You can also add, edit and delete pledges from this section. Permissions by user may vary.*

Pledges Section

The screenshot shows the 'Pledges' section with a table of pledges. A red arrow points to the 'Add Pledge' button at the bottom right. Another red arrow points to the 'Edit' icon (pencil) in the 'Balance' column of the first pledge row.

Fund	Responsible Person	Begin Date	End Date	Amount	Contributions	Balance
General Campaign	Jane	1/1/2010	12/31/2013	\$1,200.00	\$230.00	\$970.00

Page: 1 of 1 Page Size: 95 Refresh 1 Pledge(s)

Add Pledge: Building Campaign Add

Steps to Edit a Pledge:

- 1) Click the **Edit** icon of the pledge you want to edit.

Edit a Pledge

The screenshot shows the 'Pledges' section with a single pledge row. A red arrow points to the 'Edit' icon (pencil) in the 'Balance' column.

Fund	Responsible Person	Begin Date	End Date	Amount	Contributions	Balance
General Tithing	Jon	2/1/2007	8/31/2007	\$0.00	\$0.00	\$0.00

- 2) Make desired changes

Edit Dates or Amount

The screenshot shows the 'Pledges' section with a single pledge row. The 'Begin Date' and 'End Date' fields are highlighted with red boxes, and the 'Amount' field is also highlighted. A red arrow points to the 'Save' icon (checkmark) in the 'Balance' column.

Fund	Responsible Person	Begin Date	End Date	Amount	Contributions	Balance
Offering-Tithes	Linda	8/19/2010	12/31/2015	500.00	\$215.00	\$285.00

- 3) Click the save icon.



Pledges are retroactive, so if a contribution falls within the pledge date range it counts towards the pledge amount.

Contribution History

This section displays all contribution and online giving history for the person.

Contribution History

Contribution History

From: 1/1/2009 Through: Fund: Type: Transaction:

Apply Filter

Contributions Fund Summary

Contribution Total \$164.15
Fund Total \$164.15

☐ Show Memo ☐ Show Images

Transaction Detail	Batch	Contribution Date	Name	Type	Amount	Fund(s)
4	one hundred control	6/9/2009	Weinberg, Dan	E-Check	\$100.00	Building Fund: \$100.00
090518112902406	Online Giving Visa_M	5/18/2009	Weinberg, Dan	Visa	\$1.00	DW Mission Fund: \$1.00
090217120739053	Online Giving Visa_M	2/17/2009	Weinberg, Kaly	Visa	\$5.00	DW Mission Fund: \$5.00
090217120532467	Online Giving Visa_M	2/17/2009	Weinberg, Kaly	Visa	\$0.12	DW Mission Fund: \$0.12
090217115951713	Online Giving Visa_M	2/17/2009	Weinberg, Kaly	Visa	\$0.17	DW Mission Fund: \$0.17

Page: 1 2 3 of 3 Page Size: 5 Refresh 15 Contribution(s)

Reassign Person...

- Use the filters to sort the contributions by date range, fund, type, or transaction number.
- You can use the [Reassign Person...](#) to associate a single or multiple contributions to a different person.

Repeating Payment Profiles

If the person has created any repeating payments through online giving, those payments will show in this section. If permissions allow, you can also add a new Repeating Payment from this page. **See Repeating Payments.**

Repeating Payments Profiles

Repeating Payment Profiles

Identifier: Set up between: and: Amount From: To: Frequency:

Apply Filter

☐ Show Active and Inactive

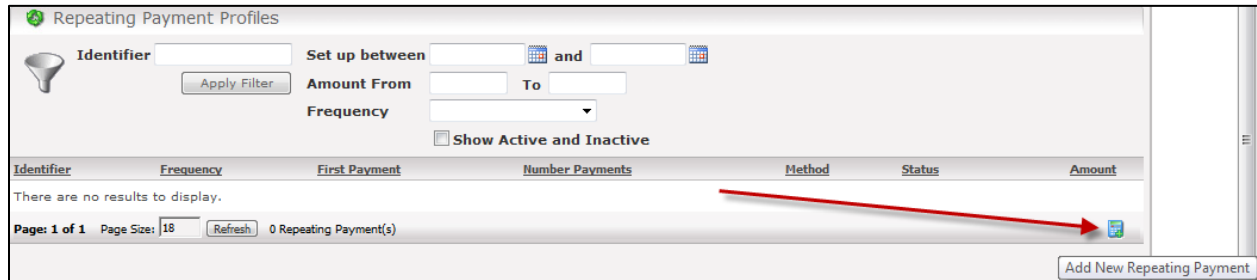
Identifier	Frequency	First Payment	Number Payments	Method	Status	Amount
090212163025410	Every Week	2/13/2009	Until Cancelled	Visa	Active	\$1.01
090212163810462	Every Week	2/13/2009	1	Visa	Active	\$1.02
090212165438423	Every Week	2/13/2009	1	Visa	Active	\$1.03

Page: 1 of 1 Page Size: 27 Refresh 3 Repeating Payment(s)

Steps to Add a Repeating Payment:

- 1) Click the **Add Repeating Payment** icon.

Repeating Payments



Repeating Payment Profiles

Identifier Set up between and
Apply Filter Amount From To
Frequency Show Active and Inactive

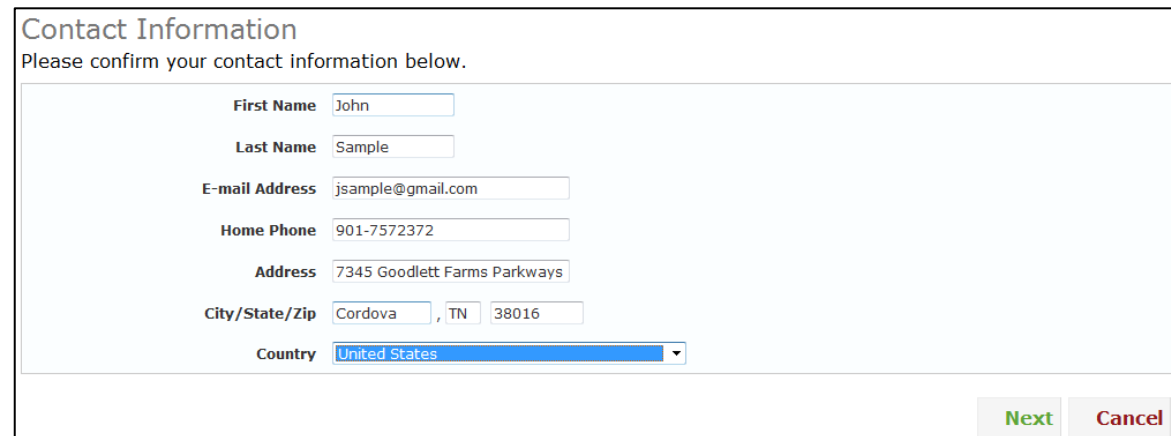
Identifier	Frequency	First Payment	Number Payments	Method	Status	Amount
There are no results to display.						

Page: 1 of 1 Page Size: 18 Refresh 0 Repeating Payment(s)

Add New Repeating Payment

- 2) Enter **personal information**.

Repeating Payment Contact Information



Contact Information

Please confirm your contact information below.

First Name

Last Name

E-mail Address

Home Phone

Address

City/State/Zip ,

Country

Next Cancel

- 3) Click **Next**.

- 4) Enter **Profile Name**, select a **frequency**, a **begin date** and **how long** the payments should continue, and enter **amounts** for each **fund**. *The begin date must be a future date.*

Repeating Profile Information

Giving Frequency and Amount

Enter the frequency and amount that you'd like to give.

Profile Name

Frequency

Begin Date

Number of Payments ☐
☒ Pay Until Further Notice

Fund	Amount
General Fund from Early Service	\$ 50.00
Regular Tithe	\$ <input type="text"/>
General Campaign	\$ <input type="text"/>
Worldside Missions	\$ 25.00
Memorial	\$ <input type="text"/>
Payment Total	\$ 75.00

[Previous](#) [Next](#) [Cancel](#)

- 5) Select **payment method** and enter the correlating **bank information**.

Payment Information

Enter how you would like to make your automated contribution.

Payment Method ☐ Credit Card ☒ Bank Account

Bank Account Information

Bank Name

Account Type ☒ Checking ☐ Savings

Routing Number

Account Number

Bank Routing Number 114412721

Account Number 14721245

The Routing Number appears between these symbols

The Account Number appears before this symbol

Note: Some checks also contain the check number at the bottom with the routing and account number. Please **do not** include the check number.

You will be redirected to a secure Payment Data Systems site. For more information about the redirect, click [here](#).

[Previous](#) [Next](#) [Cancel](#)

- 6) Click **Next**.

7) **Confirm Information.**

Confirm Information	
Please confirm the information below. Once you have confirmed that the information is accurate and have read the On-Line Giving Agreement please click the 'Finish' button to complete your transaction.	
Name	John Sample
E-mail Address	jsample@gmail.com
Home Phone	901-7572372
Address	7345 Goodlett Farms Parkways
City/State/Zip	Cordova, TN 38016
Country	United States
Profile Name	My Giving Profile
Frequency	Once a Month
Begin Date	8/12/2011
Number of Payments	Until Further Notice
General Fund from Early Service	\$50.00
Worldside Missions	\$25.00
Total Contribution:	\$75.00
Payment Method	Bank Account
Bank Name	first national bank
Account Type	Checking
Account Number	123456789
Routing Number	55555550
By clicking the 'finish' button below I agree to allow Your Church Description to debit the amount above from my account. I acknowledge that I may update the transaction information at any time by returning to this website, or by calling the Finance Office.	
<div> Previous Finish Cancel </div>	

8) Click **Finish**. The below Confirmation page will display.

Repeating Payment Confirmation

<p>Confirmed</p> <p>Thank-you for your automated contribution. Below is your confirmation number. Please do not use your browser's Back button as you may be charged again.</p> <p>Confirmation Number: 110811130748FEN</p> <p>View Existing Profiles</p> <p>View Contributions</p> <p>Go Back</p>
--

COUNSELING

This tab allows users to track confidential information for an existing record. *View and edit rights may vary by user.*

Counseling Tab

Person Detail

ID	Status	Requestor	Counselor	Start Date	End Date	Restrictions
26	Standard	Linda Sample		8/11/2011	8/11/2011	

Page: 1 of 1 Page Size: 18 Refresh 1 Counsel(s)

Steps to Add a Counseling Request:

- 1) Click the **Counseling** tab on the Person Detail page.
- 2) Click the **Add New Counsel** icon.
- 3) Select **Pastoral Concerns**. *See your Arena Administrator to customize these options.*
- 4) Enter **Summary**.
- 5) Select if the **person is aware of the counseling request**.

Private Case Note

Person Detail

Individual Information	Security	Person Viewed	Contributions	Prayer Requests	Counseling
<p>Name Scott Clem [R]</p> <p>Pastoral Concerns</p> <p><input type="checkbox"/> Easily angered <input type="checkbox"/> Emotionally unstable</p> <p><input type="checkbox"/> Pridefulness <input type="checkbox"/> Struggling with addiction</p> <p>Summary</p> <p>struggling with relocation</p> <p>Was this person made aware of this counseling request? Yes</p> <p>Create Cancel</p>					

- 6) Select **Create**.

Steps for Processing a Counseling Note:

- 1) Click the **Counseling tab** on the person detail of the person with a counseling note.
- 2) Click the [counseling note](#).

Counseling Tab

Person Detail						
Individual Information		Security	Person Viewed	Contributions	Prayer Requests	Counseling
ID	Status	Requestor	Counselor	Start Date	End Date	Restrictions
26	Standard	Linda Sample		8/11/2011	8/11/2011	
27	Standard	Kate Sample		8/11/2011	8/11/2011	

- 3) Select **Edit** for any section.

Counseling Note

Person Detail

Individual Information

Security

Person Viewed

Contributions

Prayer Requests

Counseling

Name Scott Clem [R]

Start Date 8/11/2011

End Date 8/11/2011

Private Case Notes [Edit](#)

Facts [Add Fact](#)

8/11/2011 by Marie Sample at 8/11/2011 1:17:40 PM
Person is aware counseling request was submitted.

Observations [Add Observation](#)

Documents [Add Document](#)

Name

Date Created

Type

There are no results to display.

Restrictions [Edit](#)

Restrictions Pastoral Concerns

Status Information [Edit](#)

Requestor Marie Sample

Counselor

Summary

Status Standard

Return to List...

Name Scott Clem [R]

Status Standard

Summary

Restrictions

Pastoral Concerns

Counselor

Requestor Marie Sample

Return to List...

Counseling Notes

Private Case Notes

Facts

Fact Date

Fact

Observations

Observation Date

Observation

Restrictions

Restrictions ☐ Limited access to children ☐ Limited access to money

Pastoral Concerns ☐ Easily angered ☐ Emotionally unstable ☐ Pridefulness ☐ Struggling with addiction

NOTE: See your Arena Administrator regarding customizing Restrictions and Pastoral Concerns.

- 4) Assign counselor and change status, as desired.

Status Information

Status Information

Contact Person [Fred Sample](#)

Counselor

Status

- **Contact Person** – This is the current user. *You cannot change the contact person.*
- **Counselor** – Select a counselor for this counseling note.
- **Status** – Select a status for this counseling note.
- **Done** – Clicking this button will return you to the Counseling tab.

- 5) Click **Save**. Arena will send an e-mail to the Counselor to notify him or her of the counseling note.

BUSINESS INFORMATION

If you setup a record as a business, the person information fields accommodate business information, as shown below.

Business Profile

Personal Information		Edit
Person/Foreign ID:	344/0	
Member Status:	Member	
Record Status:	Active	
Campus:	Campus 1	
Name:	Shelby Systems	
Date Added:	4/27/2010	
Date Modified:	4/27/2010	
Date Last Verified:	4/27/2010	Verify

- Person ID/Foreign ID (Foreign ID = Shelby Systems Name ID if synchronized with Shelby Systems v5 software)
- Member Status
- Record Status
- Campus
- Name
- Date Added (to Arena)
- Date Modified
- Date Last Verified (Click the [Verify](#) link to update when the record was last confirmed to be correct)











Add New Family

This page allows you to add new people or businesses to Arena. We recommend you search by name using Quick Search or the White Pages to determine if the person/family or business already exists, to prevent duplication of records.

Steps to Add a New Person/Family or Business to Arena:



- 1) Click **Membership** → **Add New Family**, or click **Add Person/Family** from the search results page.

Family Members

Family Members					Record/Member Status		Contact Info		Address	
Title	First	Nickname	Middle	Last	Family Role	Birth Date	Gender	Marital Status	Anniversary Date	
 Mr.	Mark			Sample	Adult	6/14/1948	 Male	Married	9/22/2001	 
 Mrs.	Jane	Jane		Sample	Adult	10/3/1966	 Female	Married		 

Add New Person Add Existing Person



If the icon by the person's name has a plus  it means you are adding a new record. If the icon does not have a plus,  it means the record already exists in the database.

- 2) Click **Add New Person** to add each family member. *Data entry time will be shorter because certain fields such, as address, will propagate to all records.* If you are adding a person that already exists in the database to a family, as in the case of marriage, then click **Add Existing Person** to search and select the person you wish to add.
- 3) Select title (if desired), enter first name, enter nickname (if applicable), enter middle name (if available) enter last name, select family role, enter birth date (if available), select gender (if available), select marital status (if available) and enter wedding anniversary date (if available) for each family member you are adding. Once you enter information on this tab, click the **Next** button or the **Record/Member Status** tab to continue. Arena will enter the **Family Name** once advancing to the Record/Member Status tab, using the last name of the first person.

- 4) Make the appropriate selections for record and member status.

Record/Member Status

Home > Membership > White Pages

Family Name: ☒ Person ☐ Business

Family Members	Record/Member Status	Contact Info	Address		
Record Status	Member Status	Inactive Reason	Campus	Assign Envelope	
John Sample	Active	Member		Main Campus	<input type="checkbox"/>
Jane Sample	Active	Member		Main Campus	<input type="checkbox"/>

Previous Next Finish



Record status will default to Active. You must add a member status or a warning will display. If you select Inactive Record Status, you will need to select a reason.

- 5) Enter the Main/Home, Business, and Cell phone numbers, and/or E-mail address for each family member, if desired. *Enter 10-digit phone numbers without formatting (no spaces, dashes, or parentheses). You can enter international phone numbers with formatting. The main/home phone number will propagate for the rest of the family.*

Contact Info

Family Name: ☒ Person ☐ Business

Family Members	Record/Member Status	Contact Info	Address
Main/Home	Business	Cell	Email
Kate Johnson	(999) 999-9999	(789) 489-7487 ext. <input type="text"/>	(901) 789-7894 <input type="text"/>
Stewie Administrator	(999) 999-9999	(123) 456-7890 ext. 123	(123) 465-5555 caleb.mail@gmail.com

Previous Next Finish

- 6) Press **Next** to advance to the address tab.

7) Enter the **Main/Home Address** of the family.

- For the Main/Home and Family Alternate Address Type, the address entered for the first person will propagate to all family members.
- If the zip code is unknown, enter the city and state. Click **Standardize Addresses** and Arena will attempt to standardize, adding the zip+4 zip code, if available.
- To make entry faster, you can also enter a zip code without entering a city and state.

Address Tab with a Domestic Address

Family Members	Record/Member Status	Contact Info	Address
Main/Home Address			
Kate Johnson	<input checked="" type="checkbox"/>	Primary Address	<div> <div>7345 Goodlett Farms Pkwy</div> <div>Cordova</div> <div>tn</div> <div>38016-4990</div> <div>United States</div> <div>Override <input type="checkbox"/></div> </div>
Stewie Administrator	<input checked="" type="checkbox"/>	Primary Address	<div> <div>7345 Goodlett Farms Pkwy</div> <div>Cordova</div> <div>TN</div> <div>38016-4990</div> <div>United States</div> <div>Override <input type="checkbox"/></div> </div>
Standardize Addresses Family Moved			
			Previous Next Finish

Address Tab with an International Address

Family Members	Record/Member Status	Contact Info	Address
Family Name: <input type="text" value="Muldoon Family"/> <input checked="" type="radio"/> Person <input type="radio"/> Business			
Main/Home Address			
Mike Muldoon	<input checked="" type="checkbox"/>	Primary Address	<div> <div>55 Ballidean Terrace</div> <div>Dundee, Scotland</div> <div>GB</div> <div>DD4 9PA</div> <div>United Kingdom</div> <div>Override <input type="checkbox"/></div> </div>
May Muldoon	<input checked="" type="checkbox"/>	Primary Address	<div> <div>55 Ballidean Terrace</div> <div>Dundee, Scotland</div> <div>GB</div> <div>DD4 9PA</div> <div>United Kingdom</div> <div>Override <input type="checkbox"/></div> </div>
Standardize Addresses Family Moved			
			Previous Next Finish

8) Click **Finish**. Arena will also standardize addresses when you select Finish.

You can also enter alternate addresses for the family or an individual family member. Use the drop-down list in the top right corner to select an address type for the person/family or business. *If you enter more than one address, you must select Primary for one address.*

Alternative Address

- **Primary** – Indicates the primary address for the family or individual family member.
- **Override** – Indicates when the alternate address should override the primary address.

- 9) Click **Finish**. Once you select *Finish*, either the *Person Detail* page of the first person entered displays or the *Multiple Families at Same Address* page displays, as shown below. The latter indicates there are other records in the database with the same address. Be sure to also check the *Contribute Individually* checkbox for each new record.

Multiple Families at Same Address Warning

Keep in mind, there can be only one adult male and one adult female in each family. Use Relationships to identify other adult family relationships.

Does Arena Identify Duplicate Records?

If you enter a new record/family and Arena detects the new record(s) may already exist, a warning text will display above and below the wizard and you will not be able to finish the wizard until the possible duplication issue is resolved.

Possible Duplicates Warning

Home > Membership > White Pages

Family Name: ☒ Person ☐ Business ☐ I have reviewed all the Possible Duplicates

Family Members	Record/Member Status	Contact Info	Address
Jon Doe			<div> <div>Primary Address</div> <div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div> </div>

Standardize Addresses Family Moved

• Possible Duplicates record(s) for [Jon Doe](#)

Previous Next Finish

To Check for Duplicates:

- 1) Click the link for the [name](#) of **Possible Duplicates**. The list will give you two options; “Click the [Name](#) to Open Their Details” and “Click Edit to Load That Family for Editing.”

Possible Duplicate Records

Name	Birthdate	Home Phone	E-Mail
Doe, Jon	10/13/1987	(901) 555-8888	kyle.barker@arenachms.com

* Click Their Name To Open Their Details
* Click Edit To Load That Family For Editing

- 2) Choose to either make changes to the person record from the Person Detail page or open the Edit Family Wizard to make changes to the existing person/family.
- 3) If there are no duplicate records, check the "**I have reviewed all the Possible Duplicates**" box. Once checked, you can then finish the wizard.




You may also select the **Merge Members** section of Membership to combine any duplicated records.

Steps to Remove Someone from a Family:



- 1) Locate the **family**.
- 2) From the Person Detail page, select **Edit** on the Family section.

Profile Family Information

Sample Family:			Edit
Johnny Sample	Adult	Member (Inactive)	
Jane Sample:	Adult	Member	

- 3) Click  to the right of the name to remove the person from the family. *The record is removed from the family but, not removed from Arena.*

Edit Family Wizard

Family Members					Record/Member Status		Contact Info	Address	
Title	First	Nickname	Middle	Last	Family Role	Birth Date	Gender	Marital Status	Anniversary Date
	<input type="text" value="John"/>	<input type="text" value="Johnny"/>	<input type="text" value=""/>	<input type="text" value="Sample"/>	<input type="text" value="Adult"/>	<input type="text" value="6/14/1948"/>	<input type="text" value="Male"/>	<input type="text" value="Married"/>	<input type="text" value=""/>
	<input type="text" value="Mrs."/>	<input type="text" value="Jane"/>	<input type="text" value="Marie"/>	<input type="text" value="Sample"/>	<input type="text" value="Adult"/>	<input type="text" value="10/3/1966"/>	<input type="text" value="Female"/>	<input type="text" value="Married"/>	<input type="text" value="8/22/2001"/>

- 4) Click **Finish**.
- 5) **Review** both records for any changes such as address or phone number.

COMMON RECORD QUESTIONS

Does Arena record the information I edit?

Yes. Arena adds a note to the person's history when you edit a person's information. It will contain the date, time, person and information you edited.

History section

History			<input checked="" type="checkbox"/> View History
Person Updates			Display: 5 ▾
Restriction changed from 'False' to 'True'	5/21/2010 1:48 PM	Jane Sample	
Merged Person Record: 335 (Jane Sample)	4/29/2010 7:35 AM	Jane Sample	
Merged Person Record: 333 (Jane Sample)	4/29/2010 7:35 AM	Jane Sample	
Created Person: Jane Sample	4/29/2010 7:35 AM	Jane Sample	
Created Person: Jane Sample	4/25/2010 5:29 PM	Jane Sample	
Email Communications			Display: 5 ▾
Subject: test; From: Beth Jones	5/21/2010 10:06 AM	bjones	
Subject: test; From: Beth Jones	5/21/2010 10:04 AM	bjones	
Subject: test; From: Beth Jones	5/21/2010 9:59 AM	bjones	

How do I Add a Person's Nickname?

- 1) Look the person up in Arena using the **Quick Search**.
- 2) Click on Edit to the right side of Personal Information.
- 3) Enter the **Nickname**.

Personal Information

Personal Information	
Person/Foreign ID:	300/0
Member Status:	Member ▾
Record Status:	Active ▾
Campus:	Campus 1 ▾
Staff Member:	<input type="checkbox"/>
Title:	Mrs. ▾
First Name:	Jane
Nick Name:	Janie
Middle Name:	Marie
Last Name:	Sample

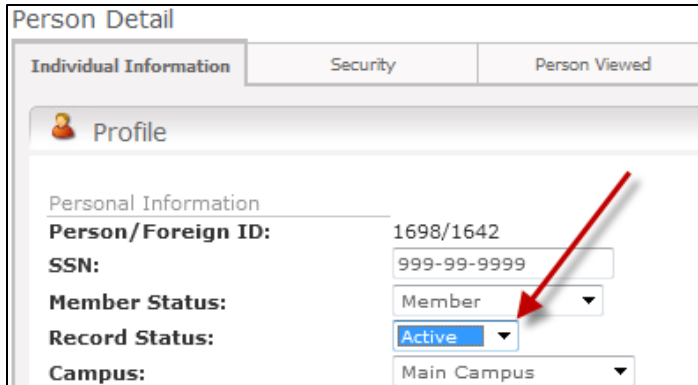
- 4) Click **Save**.

Steps to Update the Record Status:

You can update the records status in the personal information section on the person details page of using the Family Wizard. *When changing a record status to inactive (from the Edit Family Wizard or the Person Detail Page) a confirmation dialog box displays. This dialog box alerts the user that the Member's status in associated Tags will also be set to Inactive. If you change the record status from inactive to active, the Tags are not affected. This feature does not affect Groups.*

- 1) On the Person Detail page, click the Edit link of the personal information area or the Family Edit link..

Personal Information Section



Person Detail

Individual Information Security Person Viewed

Profile

Personal Information

Person/Foreign ID: 1698/1642

SSN: 999-99-9999

Member Status: Member

Record Status: Active

Campus: Main Campus

Edit Family Wizard Record Status

Family Members	Record/Member Status			Contact Info	Address
	Record Status	Member Status	Inactive Reason	Campus	Assign Envelope
Bob Smith	Active	Member		Main Campus	<input type="checkbox"/>
Betty Smith	Active	Member		Main Campus	<input type="checkbox"/>

Previous Next Finish

- 2) Click **Save** on the Person Detail or **Next** on the Family Wizard. *Arena will display a pop-up to confirm this action.*

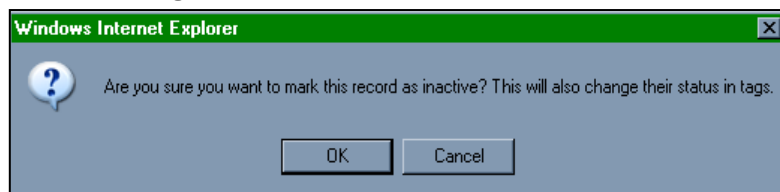
Record Status Change to Inactive from Edit Family Wizard Confirmation

Home > Membership > White Pages

Family Name: ☒ Person ☐ Business

Family Members	Record/Member Status	Contact Info	Address
<p>NOTICE: Inactive Status</p> <p>When you change a person's record status to 'Inactive,' the system will also make that person inactive in all of the tags and groups that they belong to. Changing them back to 'Active' does NOT make them active again in the tags and groups.</p> <p style="text-align: right;">Continue</p>			

Record Status Change to Inactive from Person Detail Confirmation



Once you confirm the record status to inactive, Arena will mark the reason using the default option.

Individual Information Record Status

Member Status:	Member
Record Status:	Inactive
Inactive Reason:	No Longer Attending



Person Bulk Update

The bulk update feature will add, remove or update existing information for multiple records. Options may vary by organization.

Person Bulk Update

Person Bulk Update

Update information for several individuals at the same time.
Use this page to update information for the 0 individual(s) that you have selected.

Individuals: [Add...](#) [Clear All](#)

Membership Details Member Status: <input type="text"/> Record Status: <input type="text"/> Campus: <input type="text"/> Staff Member: <input type="radio"/> Yes <input type="radio"/> No Grade: <input type="text"/> Class of: <input type="text"/>	Personal Tags <input type="radio"/> Add To <input type="radio"/> Remove From <input type="radio"/> Update Existing Personal Tag: (not set) <input type="text"/> Status: <input type="text"/> Note: <input type="text"/> Activity: <input type="text"/>
Member Path yes/no/maybe/dontknow <input type="checkbox"/> Some value: <input type="text"/> Grade Score: <input type="text"/> Activity Score: <input type="text"/> Birth Certificate: <input type="text"/> Test Lookup: <input type="text"/> How Received: <input type="text"/> Date Received: <input type="text"/> Baptised: <input type="checkbox"/> Baptism Date: <input type="text"/> Date2: <input type="text"/> Date3: <input type="text"/> Date4: <input type="text"/> Date5: <input type="text"/> Date6: <input type="text"/> Date7: <input type="text"/> Date8: <input type="text"/> Date9: <input type="text"/> MemberOfCounter: <input type="text"/> SourceCounter: <input type="text"/> SpecialProfileCounter: <input type="text"/>	Ministry Tags <input type="radio"/> Add To <input type="radio"/> Remove From <input type="radio"/> Update Existing Ministry Tag: (not set) <input type="text"/> Status: <input type="text"/> Note: <input type="text"/> Pending: <input type="text"/> In Review: <input type="text"/> Active: <input type="text"/> Dormant: <input type="text"/> Activity: <input type="text"/>
Check-In Test: <input type="text"/> Allergies: <input type="text"/> Medical Situation: <input type="text"/> Potty Training: <input type="checkbox"/> Custody Situation: <input type="text"/> Special Note: <input type="text"/>	Serving Tags <input type="radio"/> Add To <input type="radio"/> Remove From <input type="radio"/> Update Existing Serving Tag: (not set) <input type="text"/> Status: <input type="text"/> Role: <input type="text"/> Reason: <input type="text"/> Hours/Week: <input type="text"/> Prerequisites Met: <input type="checkbox"/> Pending: <input type="text"/> In Review: <input type="text"/> Active: <input type="text"/> Dormant: <input type="text"/> Activity: <input type="text"/>
Graduation Date Grade Level: <input type="text"/> Graduation Date: <input type="text"/>	Events <input type="radio"/> Add To <input type="radio"/> Remove From <input type="radio"/> Update Existing Events: (not set) <input type="text"/> Status: <input type="text"/> Note: <input type="text"/>
Testing Date Test: <input type="text"/> Lookup Test: <input type="text"/> Integer Test: <input type="text"/> String Test: <input type="text"/> Yes No Test: <input type="checkbox"/> Decimal Test: <input type="text"/> Currency Test: <input type="text"/> URL Test: <input type="text"/> GUID Test: <input type="text"/> Document Test: <input type="text"/>	Small Groups <input type="radio"/> Add To <input type="radio"/> Remove From <input type="radio"/> Update Existing Small Group: <input type="text"/> Role: [No Small Group at this Level] Status: <input type="text"/>
Education Grade: <input type="text"/>	Bobs <input type="radio"/> Add To <input type="radio"/> Remove From <input type="radio"/> Update Existing Bob: <input type="text"/> Role: [No Bob at this Level] Status: <input type="text"/>
Employment Employer: <input type="text"/> Department: <input type="text"/> Position: <input type="text"/>	Neighborhoods <input type="radio"/> Add To <input type="radio"/> Remove From <input type="radio"/> Update Existing Neighborhoods: <input type="text"/> Role: [No Neighborhoods at this Level] Status: <input type="text"/>
Sports Uniform Size: <input type="text"/> Birth Certificate: <input type="checkbox"/> Code of Conduct: <input type="checkbox"/>	Campaigns <input type="radio"/> Add To <input type="radio"/> Remove From Campaigns: <input type="text"/>
Volunteer Information BG Check: <input type="checkbox"/> Name Tag Issued: <input type="text"/> Volunteer Application: <input type="text"/> Background Check: <input type="text"/> Food Handler Card: <input type="text"/>	Spiritual Gifts <input type="checkbox"/> None <input type="checkbox"/> Patience <input type="checkbox"/> Wisdom <input type="checkbox"/> Encouragement <input type="checkbox"/> Prophecy
Visit Dates First Visit: <input type="text"/> Second Visit: <input type="text"/> Third Visit: <input type="text"/>	
Membership Details Varchar_Max: <input type="text"/> Date Joined: <input type="text"/> Baptism Date: <input type="text"/> Signed Covenant: <input type="text"/>	



If no campaigns exist, the campaigns section will not display on this page.

Steps to Bulk Update Existing Records:

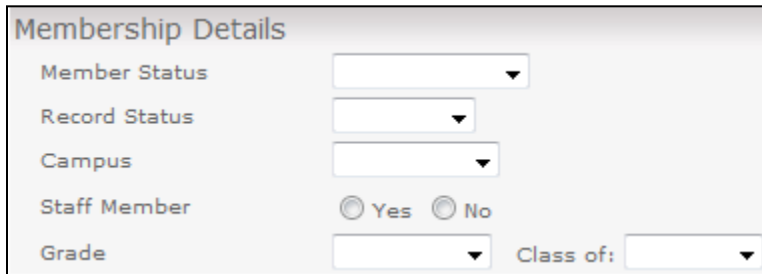
- 1) Click the **Add...** link to search and select existing records you want to update. *The records will display in order of person id.*

Person Bulk Update Add

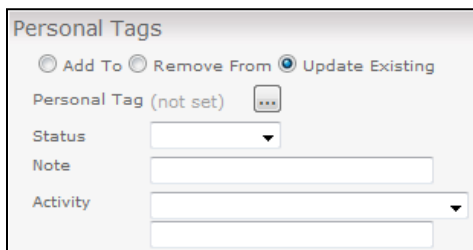


- 2) Make desired **selections**. *If no campaigns exist, the campaigns section will not display on this page.*

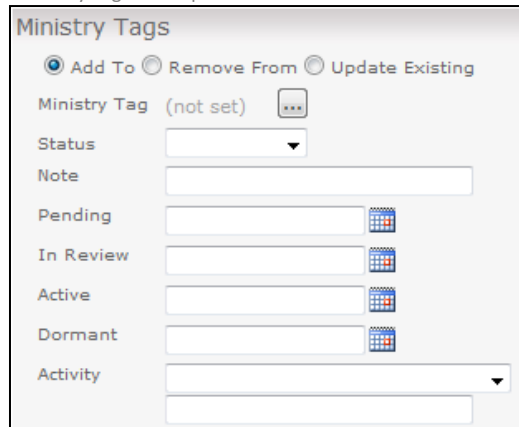
Membership Details Bulk Update



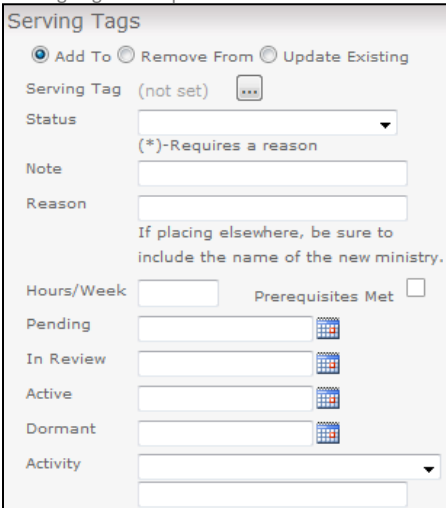
Personal Tags Bulk Update



Ministry Tags Bulk Update

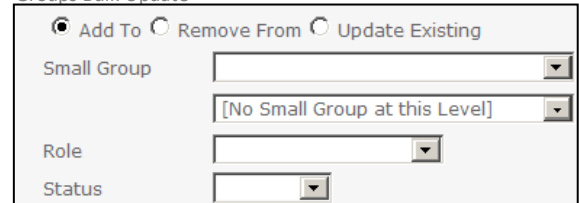


Serving Tags Bulk Update



Once you select a Tag, selecting additional information is optional.

Groups Bulk Update




- 3) Click **Update** at the bottom of the page.

Merge Members

The Merge Members page allows you to combine records using a step-by-step wizard. Arena's Merge Wizard identifies fields that contain different values. If a field has only one value for that particular attribute, Arena assumes that attribute is the correct one to retain.

Steps to Merge Members:

- 1) Go to **Membership** → **Merge Members**.
- 2) Click on the [Add People](#) link, as shown below, to use the Person Search pop-up where you can select the records to merge. You can merge as many records as necessary into one record. You can also click the Merge Member  icon from a people grid list.

Merge Members

Merge Duplicate Members

Person Selection:

Welcome to the Person Merge Utility. This utility is used to merge two or more people and all of their associated data and relationships into one new person. When people are merged, all of the group associations, addresses, phones, history, etc. will be merged into one person. When the people being merged have conflicting attributes, you will be asked to select the attribute to use for the new person.

Use the [Add People](#) link below to add additional people to be merged. You will not be able to continue unless there are at least two people selected. To remove a person from the list, click the [Remove](#) link in the right most column of the person you wish to remove.

[Add People](#)

Name	Birth Date	Address	Active Meter	Person Last Modified	Address Last Modified	Foreign ID
Memphis Sample	1/1/1900		0	Remove	4/11/2011	1631
Memphis Sample	1/1/1900		20	Remove	4/11/2011	1632

Once you have selected the people to be merged, click [Next](#) below.

Step 1 of 3

[< Back](#)
[Next >](#)
[Finish](#)

- Click [Add People](#) to add more records to this merging instance.
 - If you incorrectly added a record, click [Remove](#). Click [Add](#) to add a record. This will remove the record from the merge process. *You cannot delete records from this page.*
 - The Merge Wizard also displays the number of fields that contain a differing value.
- 3) Click **Next**. Arena will display a page for every field where the values differ. After selecting the value to keep for each field, click **Next** until you have reviewed and selected all fields.

- 4) On the last page of the wizard, click “**Finish**” to complete the merge. The merge completes when you click “Finish.” Arena removes the previous duplicate records and the new record will display with a new Person ID number that may affect Security, e-Newsletters, Check-In, etc. *You cannot reverse this process.*

Merge Members Completion

Merge Duplicate Members

Congratulations

You are now ready to merge these people into one new person.

To complete the merge process and view the new person, click **Finish** below.

Step 3 of 3

< Back Next > Finish

Me

The Me page allows the logged-in person to view his or her Person Detail page without having to search by using the Quick or Person Search. *Arena verifies the current user based on the Authentication mode.*



Active Campaigns

! See your Arena Administrator if there are no campaigns.

The Active Campaigns page will display a list of all current campaigns. Clicking on the hyperlink of a Campaign will open a new window with the next family to contact, as shown below.

Active Campaigns

The screenshot shows a web application window titled 'Calling Campaign'. On the left is a vertical sidebar with a telephone icon and the text 'Calling Campaign'. The main content area is titled 'Administrator Family'. It contains several form sections: 'Home Phone' (999) 999-9999, 'Home Address' (7345 Goodlett Farms Pkwy, Cordova, TN 38016-4990), 'Register for Small Group' (with checkboxes for Ralph and Arena, and dropdowns for 1st and 2nd choices), and a tabbed interface with tabs for 'Ralph [28]', 'Arena', 'Stewie [30]', and 'Jane'. The 'Ralph [28]' tab is active, showing fields for Title, First Name (Ralph), Nick Name (Ralph), Last Name (Administrator), Role (Adult), Gender (Male), Marital Status (Unknown), Birth Date (5/21/1982), Business Phone, Cell Phone, and Campaign Workflows. To the right of these fields are 'Email' fields with 'Active' checkboxes and a 'Current Small Group Information' section showing 'Area', 'Status' (In a Small Group), and 'Small Group' (Everyone down two steps Member). Below this is an 'Add Prayer Request' section with a text area. At the bottom is a 'Notes for Database Administrator' section with a text area and a disclaimer. At the very bottom are four buttons: 'No Answer', 'Left Message', 'Invalid Number', and 'Complete'.

Each tab represents a family member, listed by age. On this page, you can update the personal information of each family member, register someone for a small group, add an individual prayer request, initiate an assignment workflow, add campaign notes, email an individual, and select the result of the call.

Arena allows several people to work in the same Calling Campaign. The same family will not appear for different Campaign Volunteers simultaneously. Once a family displays, they will not display again in the same campaign for one hour, regardless of the result, and even if the Campaign window is closed without choosing a result (unless the result completes the campaign for that family, in which case the family will not show again in the campaign at all).

When the below screen displays, the volunteer has gone through all the families in the campaign.

Campaign Completion

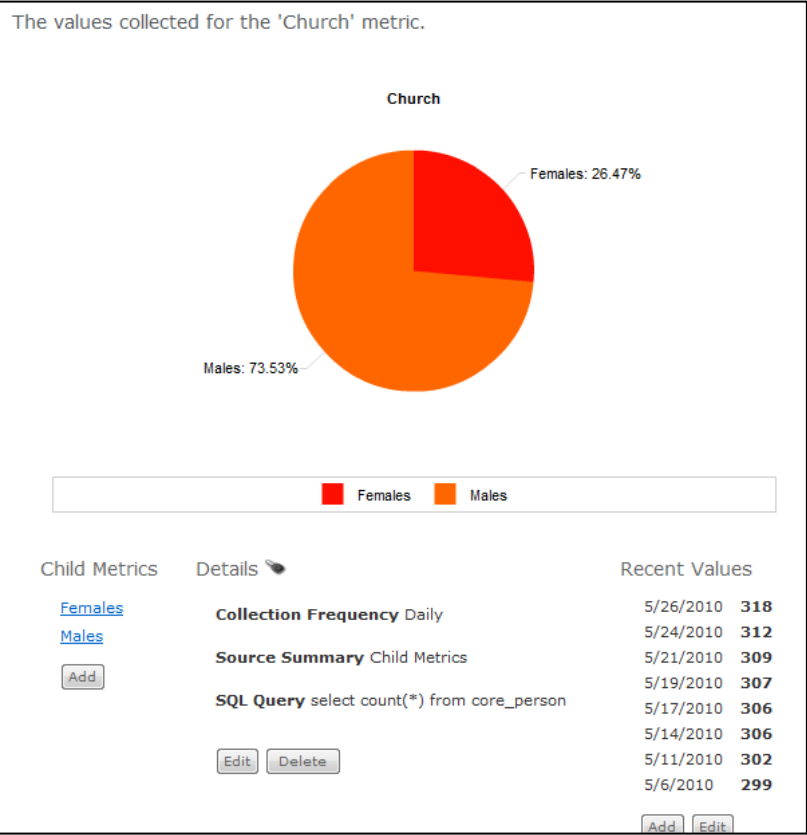


If you have no contact with anyone in the campaign, after one hour, those families will display again and the volunteer can attempt to reach the family again.

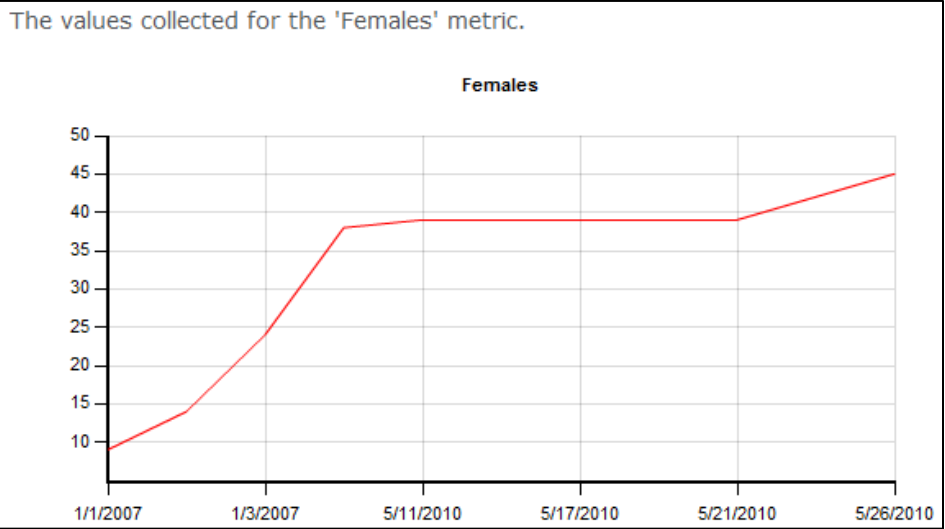
Metrics

The Metrics page is where you can graphically display various Arena data in an area, pie chart, multiline, area stacked, or line graphic.

Pie Chart Metric



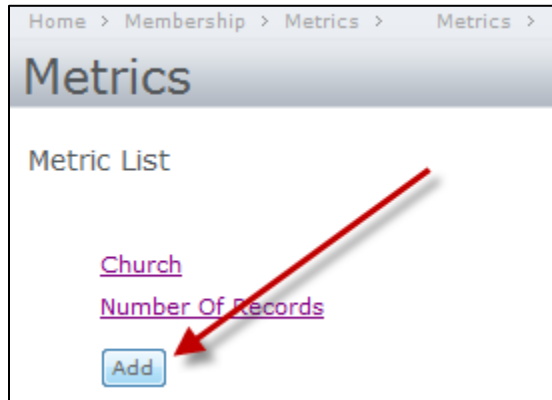
Line Metric



Steps to Add a Metric:

- 1) Go to Membership→ **Metrics**.
- 2) Click the **Add** button.

Add a Metric



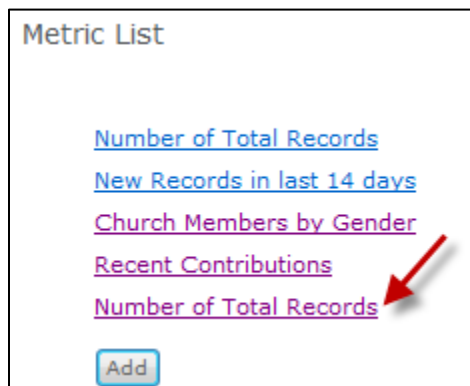
- 3) Enter a **Name** for this metric.
- 4) Click **Add**.

Metric Name

A screenshot of the 'Add Metric' dialog box. It has a title bar with a close button. Inside, the text 'Add Metric' is at the top. Below it is a label 'Metric Title' followed by a text input field containing 'Number of Total Records'. At the bottom right are two buttons: 'Add' and 'Cancel'.

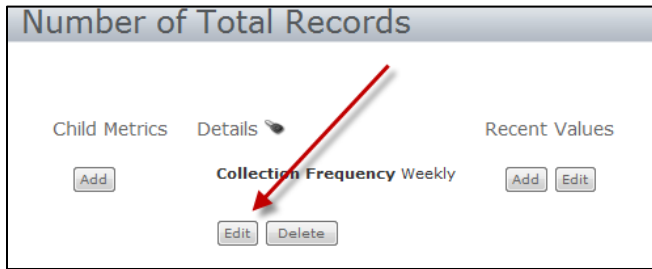
- 5) Select the **Metric** from the list.

Metric List



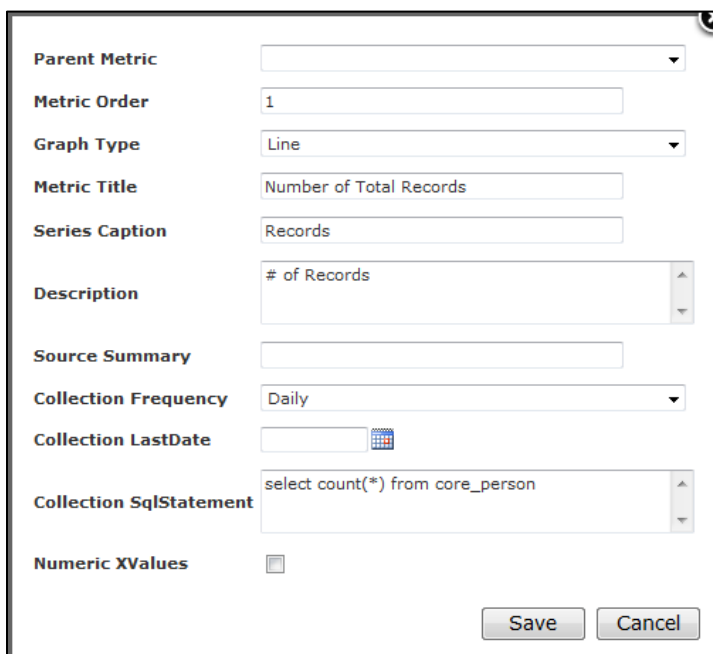
6) Select **Edit**.

Editing a Metric



7) Enter the required and desired **fields**, as shown below.

Metric Details



- **Parent Metric**—If using child metrics, select the parent metric.
- **Metric Order**—Enter 1 if not using child metrics.
- **Graph Type**—Select graph type.
- **Metric Title**—Enter a title for this metric, to display above the graph.
- **Series Caption**—Enter a caption for this metric, to display below the graph.
- **Description**—Enter a description for this graph, to display above the graph.
- **Source Summary**—Enter a source summary for this metric.
- **Collection Frequency**—Select the frequency the data should be collected.
- **Collect Last Date**—This is the last date data was collected.
- **Collection SQL Statement**—Enter the SQL statement for this metric.
- **Numeric XValues**—Check this box if you would like to display the X-axis values for this metric.

8) Click **Save**.

Steps to Add a Child Metric:

- 1) Select the **Metric** to which you would like to add a child metric.
- 2) Click **Add**.

Adding a Child Metric

The screenshot shows the 'Child Metrics' interface. At the top, there are two tabs: 'Child Metrics' and 'Details'. Below the tabs, there is a table with one row: 'Collection Frequency Daily'. To the left of this row is a blue 'Add' button, which is highlighted by a red arrow. To the right of the table, there is a 'Recent Values' section showing two rows of data: '6/17/2011 1,596' and '6/15/2011 1,596'. Below the table, there is a 'SQL Query' field with the text 'select count(*) from core_person'. At the bottom of the interface, there are 'Edit' and 'Delete' buttons.

- 3) Enter a **Title** for this Child Metric.

Child Metric Title

The screenshot shows the 'Add Metric' dialog box. It has a title bar 'Add Metric'. Inside, there is a 'Metric Title' label followed by a text input field containing the text 'Male Records'. At the bottom right of the dialog, there are 'Add' and 'Cancel' buttons.

- 4) Click **Add**.
- 5) Select the **Child Metric**.

Child Metric

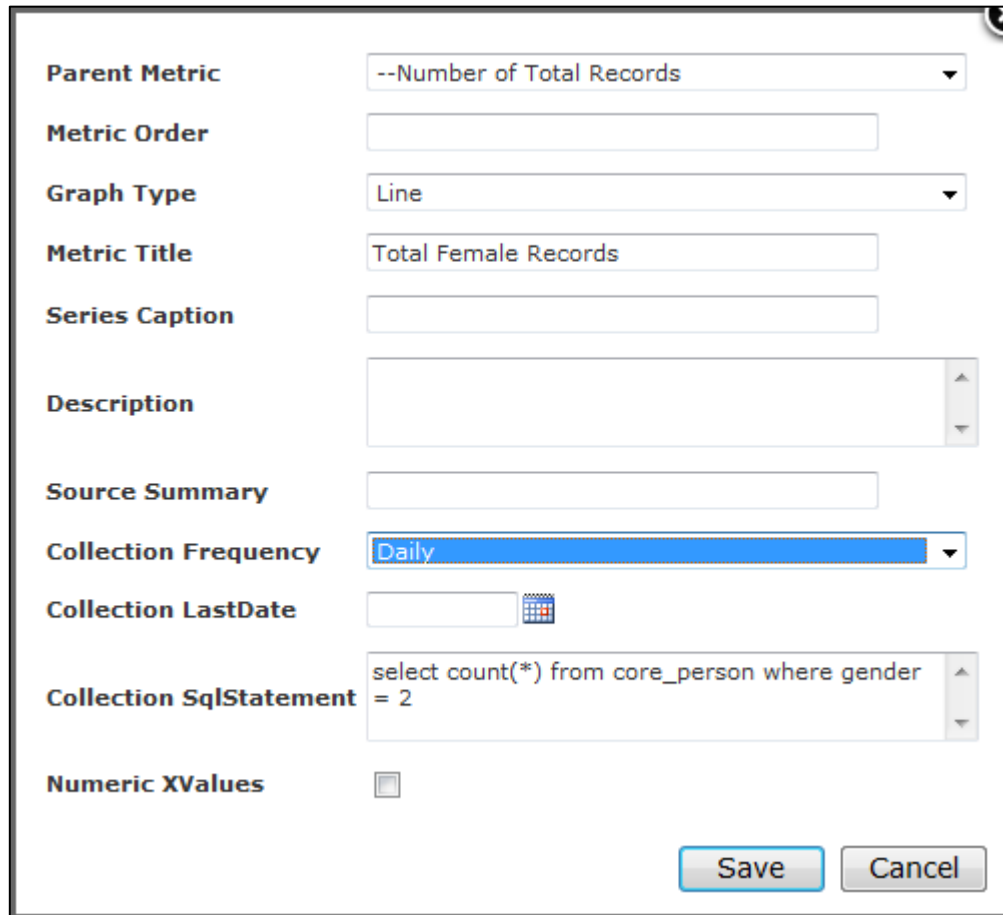
The screenshot shows the 'Child Metrics' interface. At the top, there are two tabs: 'Child Metrics' and 'Details'. Below the tabs, there is a table with one row: 'Male Records'. To the left of this row is a blue 'Add' button, which is highlighted by a red arrow. To the right of the table, there is a 'Recent Values' section showing two rows of data: '6/17/2011 1,596' and '6/15/2011 1,596'. Below the table, there is a 'SQL Query' field with the text 'select count(*) from core_person'. At the bottom of the interface, there are 'Edit' and 'Delete' buttons.

- 6) Click **Edit**.

The screenshot shows the 'Child Metrics' interface. At the top, there are two tabs: 'Child Metrics' and 'Details'. Below the tabs, there is a table with one row: 'Collection Frequency Weekly'. To the left of this row is a blue 'Add' button. To the right of the table, there is a 'Recent Values' section showing two rows of data: '6/17/2011 1,596' and '6/15/2011 1,596'. Below the table, there is a 'SQL Query' field with the text 'select count(*) from core_person'. At the bottom of the interface, there are 'Edit' and 'Delete' buttons. The 'Edit' button is highlighted by a red arrow.

- 8) Enter the **appropriate fields**, including the SQL statement for this metric.

Metric Details



The Metric Details dialog box contains the following fields and controls:

- Parent Metric:** A dropdown menu with the selected value "--Number of Total Records".
- Metric Order:** An empty text input field.
- Graph Type:** A dropdown menu with the selected value "Line".
- Metric Title:** A text input field containing "Total Female Records".
- Series Caption:** An empty text input field.
- Description:** A large text area with a vertical scrollbar, currently empty.
- Source Summary:** A text input field.
- Collection Frequency:** A dropdown menu with "Daily" selected and highlighted in blue.
- Collection LastDate:** A text input field followed by a calendar icon.
- Collection SqlStatement:** A text area containing the SQL query: `select count(*) from core_person where gender = 2`.
- Numeric XValues:** A checkbox that is currently unchecked.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

- 9) Click **Save**.



Public Lists and My Lists

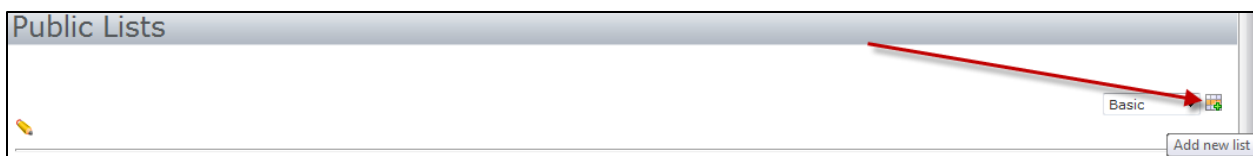
You can create lists by choosing desired criterion that will result in a list of names who meet the selected criterion. Once the list displays, you can merge records with existing documents or reports, bulk update selected records, send an e-mail or SMS text message to selected records, create labels, or export to Excel®. Lists always display as a columnar report.

Public Lists and **My Lists** function the same except that lists created on the **Public Lists** page will be available to other Arena users whereas, lists created on the **My Lists** page are available to the List creator only.

Steps to Create a New List:

- 1) Click Membership → **Public Lists** or **My Lists**.
- 2) Click the **Add New List**  icon to create a new one.

New List



- 3) Enter a **Report Name**.
- 4) Select a **Report Type**. Options are Computer Systems, Contribution, Group Report, and Parent Report. Criteria differs by Report Type.
- 5) Select a **Category**, if available.
- 6) Enter a **Description** that adequately describes this Report.

List Name and Description

List Name and Description

Enter the name and description for your list

Name:

Adult who are not in a Small Group

Type:

Person Report

Category:

Small Groups

Description:

this report contains records of adults (above the age of 25) who are not in a small group

Cancel

Previous

Next

Finished

- 7) Click **Next**.

- 8) Click a Criteria Group to expand the section and select your criteria. *Ask yourself, “Who do I want on this list?” The answer to this question will help you select the criteria. Available sections and criteria may vary for your organization.*

List Criteria

Selection Criteria

Specify the selection criteria for your report.

- Basic Criteria
- Extended Criteria**
- Advanced Criteria
- Personallity Criteria
- Small Group Criteria
- Tag Criteria
- Sport Criteria
- Campaign Criteria
- Member Path

Cancel Previous Next Finished Save



You have the option to **Save** the report at any point in the Wizard process.

Basic Criteria

The Basic Criteria tab contains some of the basic personal information. *Criteria options may vary for your organization.*

Basic List Criteria

Basic Criteria

First Name Equal To

Nick Name Equal To

Last Name Equal To J%s_n

Title Equal To

Age Between and ☐ Include Null Values

Gender ☐ Male ☐ Female ☐ Unknown

Marital Status ☐ Unknown ☐ Single ☐ Married

Member Status ☐ Member ☐ Attendee ☐ Visitor ☐ Participant ☐ WebProspect

Record Status ☒ Active ☐ Inactive ☐ Pending

- **Include Null Values** – Includes those who do not meet the selected criteria or the field is blank.



You can use the % and _ wildcards in some fields such as, the Last Name as shown above.

Extended Criteria

The Extended Criteria tab allows you to search using more individual and family information.

Extended List Criteria

Extended Criteria

Email EqualTo []

Birth Date Between [] And []

Birth Month Between [] And []

Birth Day Between [] And []

Anniversary Date EqualTo []

Adults in Family EqualTo []

Children in Family EqualTo []

Serving Status ☐ Is Not Serving ☐ Is Serving

Serving Hour EqualTo []

Unique Email EqualTo []

E-mail

- Enter any portion of the e-mail address.

Birth Date

- To search on an exact date, put that date in both boxes.
- To search on a range, enter the earliest date in the first box and the latest date in the second.

Birth Month

- To search on an exact month, put that number in both boxes.
- To search on a month range, enter the earliest month in the first box and the latest month in the second.
- If you want a month greater than a number then enter that number in the first box, leaving the second blank.

Birth Day

- To search on an exact day, put that number in both boxes.
- To search on a day range, enter the low number in the first box and the high number in the second.
- If you want a day greater than a number then enter that number in the first box, leaving the second blank.

Anniversary Date

- This is a wedding anniversary date.



You can place .5 in the Serving Hour box to represent ½ hour.

Advanced Criteria

The Extended Criteria tab allows you to search using more demographic information.

Advanced List Criteria


Criteria	Operator	Value
Date Add	EqualTo	
Date Modify	EqualTo	
Main/Home Phone	EqualTo	
Cell Phone	EqualTo	
Business Phone	EqualTo	
Distance From Church	EqualTo	
Street Address	EqualTo	
Street Line 2	EqualTo	
City	EqualTo	
State	EqualTo	
Zip Code	EqualTo	
Country	EqualTo	

- **Date Add** – This is the date the record was first added to Arena.
- **Date Modify** – The date the record was last modified.
- **Distance From Church** – The distance, in miles, that the person lives from the church. Arena will search all addresses that have been geocoded, if your organization subscribes to this service.

Personality Criteria

The Personality criterion allows you to search using both types of personality criteria.

Personality List Criteria


Personality Criteria

Spiritual Gift
☐ Patience
 ☒ Wisdom
 ☐ Encouragement
 ☐ Prophecy

Internal D
 Between And

Internal I
 Between And

Internal S
 Between And

Internal C
 Between And

External D
 Between And

External I
 Between And

External S
 Between And

External C
 Between And

- **Spiritual Gifts** – These options may vary with your organization but will list as check boxes.
- **DISC Scores** – You can search by person scores or a combination of scores. To search by an exact number, enter that number in both boxes. To search using a number range, enter the lowest number in the first box and the highest number in the second. If you want a number greater than another number then enter that number in the first box, leaving the second blank.

Small Group Criteria

The Small Group Criteria tab allows you to search for people based on the following criteria. Options for this entire section may vary for your organization.

Personality List Criteria

Small Group Criteria

Role

☐ Facilitator ☐ Leader ☐ Member ☐ Other ☐ Pending ☐ Unassigned

Group Status

☐ Unassigned ☐ Pending ☐ Member ☐ Leader

Small Group

☐ Add Registration Test (Memphis)

☐ asdfasdfsdfasdfsdfa

☒ Everyone

☐ Inactive

☐ Kyle's Group (Memphis)

☐ Kyle's Test

☐ Lucky

☒ New Group Collection

☐ New Group Collection

☐ New Group Collection

☐ Rally

☐ Shelbees (Shelby Parking Lot)

☐ Testing Org

☐ The Kyle Organization (Memphis)

☐ VBS 2007 Teachers (Memphis)

In Small Group Status

☐ In Small Group ☐ Not In Small Group

- **Role** – This is the role of the member in Groups.
- **Small Group Status** – You can search by Group Status. You can also search by **In a Small Group** or **Not In a Small Group**.
- Click the + sign to expand and continue selecting or deselecting each group level.
- Click once to add a check mark in a checkbox to search for people who are in that small group and check all levels under that group.
- Click twice to change the green check mark to a red to search for people who are not in the selected small group.
- A blank box ☐ indicates you are not using the group as criteria.



Using the in Groups and Tags is a useful tool when you need to identify people who are not in a Group, Serving Tag, Ministry Tag, or Event Tag.

Custom Attributes

By default, this section is blank. If your organization has created custom attributes, see your Arena Administrator.

Tag Criteria

This section allows you to search across Serving, Ministry and Event Tags.

Tag Criteria Search

Tag Criteria

Serving Tags

- ☒ Church Employee Tags
- ☒ dw
- ☒ dw
- ☒ dw (Copy)
- ☐ Staff Members
- ☐ test move
- ☐ test move
- ☐ Test Tag Parent
- ☐ test test
- ☐ TestMove
- ☐ whe;f

Ministry Tags

- ☐ 6/8/2007 Tag
- ☐ 6/8/2007 Tag (Copy)
- ☐ A new Ministry Tag
- ☐ blaaahhhh
- ☐ DW 01
- ☐ Everyone
- ☐ New Ministry Tag
- ☐ Parent Tag
- ☐ Question
- ☐ Test
- ☐ Worship

Event Tags

- ☐ 06/08/2007 Event Tag
- ☐ Brand New

- Click once to add a check mark in a checkbox to search for people who are in the select tag(s) and check all levels under that tag.
- Click twice to change the green check mark to a red to search for people who are not in the selected tag.
- A blank box ☐ indicates you are not using the tag as criteria.

9) After you have selected all your criteria, click the Next button.

Field Selection



Once you have selected the criteria of *who* you want to have on your list, you will next select *which* fields to display. *Full name, address and e-mail are the fields selected by default.*

Field Selection

- This single right-arrow allows you to move Available Fields to Selected Fields. *Use the Ctrl key to select multiple fields.*
- The single left-arrow allows you to move Selected Fields to Available Fields. *Use the Ctrl key to select multiple fields.*
- The double right-arrows allow you move all Available Fields to Selected Fields.
- The double left-arrows allow you to move all Selected Fields to Available Fields.



If the same field name exists in multiple Attribute Groups, the field name will include the attribute group, such as Member Path-Activity Score, as shown above.








- 9) Select the **fields** you would like to display on the final report.
- 10) **Order** the selected fields by using the sort   arrows to the right of the Selected Fields column.
- 11) Click **Next**.

Field Details

The field detail page lists the fields that will display on your report. For each field, change the heading name and alignment, as desired.

Field Details

Field Details
Below are the fields that will appear on your report. For each field, set the heading name, alignment, and any advanced options that need to be set.

Column	Heading Name	Alignment	
City	<input type="text" value="City"/>	Left <input type="button" value="v"/>	
Email	<input type="text" value="Email"/>	Left <input type="button" value="v"/>	
First Name	<input type="text" value="First Name"/>	Left <input type="button" value="v"/>	
Last Name	<input type="text" value="Last Name"/>	Left <input type="button" value="v"/>	
State	<input type="text" value="State"/>	Left <input type="button" value="v"/>	
Street Address	<input type="text" value="Street Address"/>	Left <input type="button" value="v"/>	
Zip Code	<input type="text" value="Zip Code"/>	Left <input type="button" value="v"/>	

12) Click **Next**.

Sorting

Arena allows you to sort by any of the Selected Fields. Default sort options are First Name and Last Name.

Sorting

Sorting
If you would like to sort the information that is included on your report, click "Add" to add new sorting information. Your report will be sorted based on the fields that you define here.

First Name	Ascending	✖
Last Name	Ascending	✖

[Add](#)

Cancel Previous Next Finished Save

13) Click **Add** to add other selected fields by which to sort or change the default sort options.

14) Click the **Next**.

Summary

From this page, you can run the report now, view the SQL Query or change the report to/from a Public or My List report. If you select "Report is available to everyone", it will be available on the Public Lists page. If it is not selected it will be available on the My Lists page where only you can view the List.

Summary Page

Summary
You have finished defining your report. Click the Finish button below to save your changes

☒ Run Report Now

[Display SQL Query](#)

☒ Report is available to everyone

Cancel Previous Next Finished



The **My Lists** area only displays lists created by the current user.

15) Click **Finish**.

Advanced Public Lists and My Lists

The Advanced List option allows you to select the Group and Group Criteria as before, but with the addition of AND/OR Boolean logic to use for each selected criterion (control) and the option to group criteria.

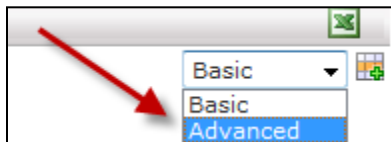
Advanced List Options

Steps to Use Advanced Lists:

The below steps outline the process for using Boolean logic for criteria selection. You can use the remaining steps as previously outlined in Public Lists and My Lists of this manual.

- 1) Select **Advanced List**.

Advanced List Option



- 2) Click **Add Group**.

Add Criteria Group

- 3) Click Select **criteria** from the criteria Group.

List Criteria

- 4) Add a second **control** or **Group**.

Add Criteria Group

- 5) Once you add at least two controls, you have the option to select either the **AND** or **OR** logic for each criteria.

Using And/Or Logic

- 6) **Repeat** steps 2 through 4 for every control you would like to include in this report.
- 7) Once you select all criteria, click **Next** to continue. *Refer to My Lists of this manual for next steps.*

Completed Lists


On the page of a completed list, all selected fields will display in a columnar format, as shown below.

Completed List







Available Merge documents: 1st time visitor ☒ Combine Family Members





Available Reports: Members

Edit List Criteria

<input type="checkbox"/>	Age	First Name	Last Name 	Email	Member Status	Zip Code
<input type="checkbox"/>	22	Jon	Doe	kyle.barker@arenachms.com	Member	38135-2270
<input type="checkbox"/>		Jon	Doe		Visitor	
<input type="checkbox"/>	49	Susan	Doe		Visitor	38018-4269
<input type="checkbox"/>		Test	Doe	jesse.brown@shelbyinc.com	Attendee	38135-2270
<input type="checkbox"/>		Test	Doe	jesse.brown@shelbyinc.com	Attendee	38135-2270

Page: ... 21 22 23 24 25 26 27 28 29 30 ... of 49 Page Size: 5 245 Item(s)

- You can e-mail the selected records by selecting the records and clicking the  icon.
- You can export the selected records to a Word document by selecting the Word®  icon.
- You can export the selected records to Excel by selecting the Excel®  icon.
- You can print the report by clicking on the  Print This Page button on the top right. This will print records displayed on the current page. If you have more than one page in your report, change the number in the page size box to accommodate all records. Click the Refresh button, then print.













As your staff creates more Lists on either the My List or Public List page, the page will display all Lists, a description of the list, the list Category, the list creator, the date the list was created, the date the list was most recently run, the copy button, the edit button and the delete button.

Home > Membership > Public Lists

Public Lists

Edit Settings

Show Category All

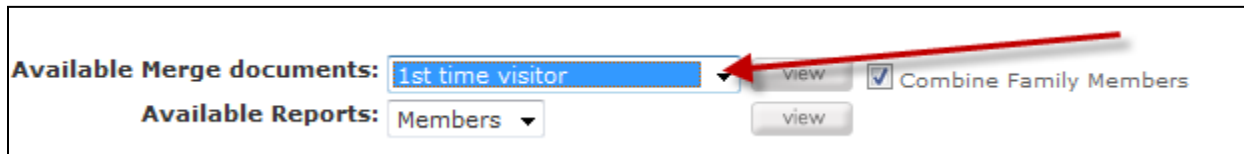
List Name	Description	Category	Created By	Created Date	Last Run Date			
List computers2 test			mherbei	08/29/11 12:15 PM	03/05/12 11:43 AM			
aa_testlist1			glenn	08/16/11 07:46 AM	02/02/12 11:31 AM			
adv 15 jul	test		mherbei	07/15/11 11:49 AM	12/15/11 12:57 PM			
Advanced List test for Query Query Lookup criteria			guym	04/14/10 09:47 AM	03/20/12 03:07 PM			
Advanced Small Group Scope			danw	07/21/10 12:21 PM	02/29/12 12:30 PM			
All active records with age			linda	04/25/10 02:22 PM				

Steps to merge Selected Records with Available Merge Documents

You can choose to merge selected records with any of the available document, including labels. This will run the report to populate the data and sends it to the selected word doc for merging.

- 1) Click the box of the people to include in the merge. If records you want to include are across multiple pages, change the page size. If you want to include all records across all pages, do not select any boxes.
- 2) Select a document from the **Available Merge Documents** drop-down.
- 3) Click **Combine Family Members**, if desired.

Available Merge Documents




Available Merge documents: 1st time visitor view







Available Reports: Members view

☒ Combine Family Members

- 4) Click **View**.
- 5) Then **Open** or **Save** for the final merge.

Steps to Edit a List:

- 1) Click the edit  icon on the My List or Public List page, or the **Edit List Criteria** link on the Report page.

Married women with children	to use for Ministry Groups	Clean-Up	LindaJ		
Member Status clean-up		Clean-Up	LindaJ		
Members not in a Group			LindaJ		


Editing a List

Report Page

Available Merge documents:	1st time visitor	<input type="button" value="view"/>	<input checked="" type="checkbox"/> Combine Family Members
Available Reports:	Members	<input type="button" value="view"/>	Edit List Criteria

- 2) The List Wizard page will display and you can make the necessary **criteria adjustments** on every page. A bold criteria section indicates selected criteria, as shown below.

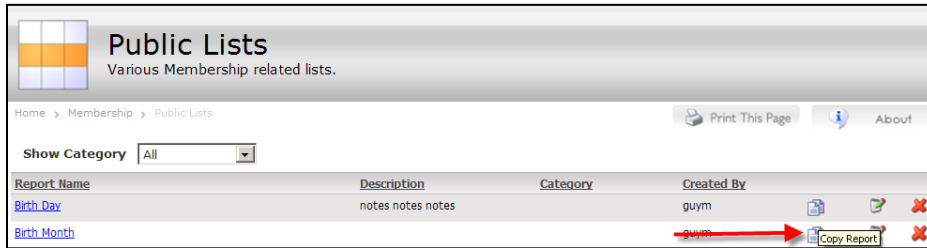
Selected Criteria

Selection Criteria Specify the selection criteria for your report.	
	Basic Criteria
	Extended Criteria

Steps to Copy a List:

- 1) From the Public List or My List page, select **Copy Report**.

List Page



- 2) **Rename** the Report.
- 3) Enter **Report Notes**.

Report Details

Report Name and Description

Enter the name and description for your report

Report Name:

Report Notes:

- 4) Select **Copy**. The new report 🌟 icon indicates the copied List.

Copied List

LAJ Test 🌟	test	Test Category	lindaj			
----------------------------	------	---------------	--------	--	--	--

- 5) Select **Edit** to modify the copied report.

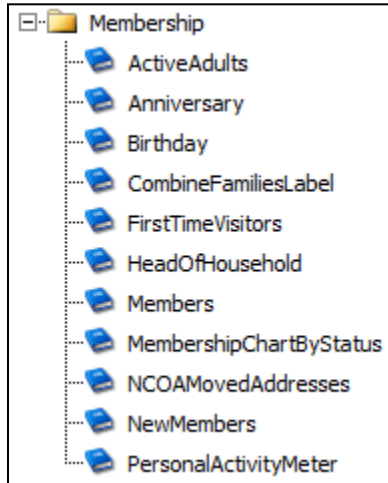
Edit List

LAJ Test 🌟	test	Test Category	lindaj			
----------------------------	------	---------------	--------	--	--	--

Reports

There are several preloaded Reports in Arena. Following is a list of the pre-loaded Membership Reports. These Reports are created using Microsoft® Reporting Services. Most reports have *Parameters* that act as filters. The next sections will list some of the preloaded Membership reports, a brief description, and the available parameters.

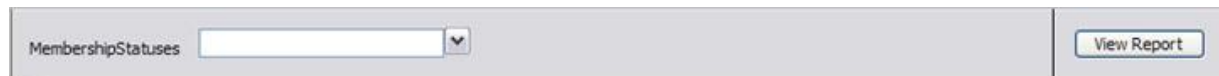
Membership Reports



Active Adults

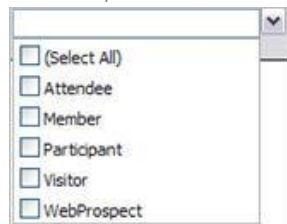
The Active Adult report displays all adults based upon membership status.

Active Adults




The drop-down list shows all of the options available to limit the output. *Options may vary for your organization.*

Membership Status Parameters



Anniversary

These parameters return records limited by the wedding anniversary date and the number of years the couple has been married. Years married calculates from the wedding anniversary date and the system date on your server.

You can enter the date in MM/DD/YY or MM/DD/YYYY format or click the calendar  icon to select the Start and End dates.

Anniversary Parameters

StartDate	<input type="text" value="9/1/2007"/>		EndDate	<input type="text" value="9/30/2007"/>		View Report
StartYearsMarried	<input type="text" value="0"/>		EndYearsMarried	<input type="text" value="100"/>		
<div>   <input type="text" value="1"/> of 1   </div> <div> Select a format  </div> <div> Export  </div>						

Birthday

These parameters return records limited by date of birth. The start and end dates limit the results by age of the person. A person's age calculates by using the birth date field and the system date on your server.

Birthday Parameters

Start Date	<input type="text" value="9/1/2007"/>		End Date	<input type="text" value="9/30/2007"/>		View Report
Start Age	<input type="text" value="0"/>		End Age	<input type="text" value="120"/>		
<div>   <input type="text" value="1"/> of 1   </div> <div> Select a format  </div> <div> Export  </div>						

First Time Visitors

First time visitors are those who have a date in the First Visit field in the Visit Dates listed on the Person Detail page. Use the parameters to limit the date range for the report.

First Time Visitors Parameters

StartDate	<input type="text" value="8/24/2007"/>		EndDate	<input type="text" value="9/24/2007"/>		View Report
<div>   <input type="text" value="1"/> of 1   </div> <div> Select a format  </div> <div> Export  </div>						

Head of Household

This report displays the Head of Household records as they pertain to a selected Member Status. Arena determines head of household by the oldest adult male in a family. If an adult male is not present, the oldest adult female is the head of household.

Head of Household

Members

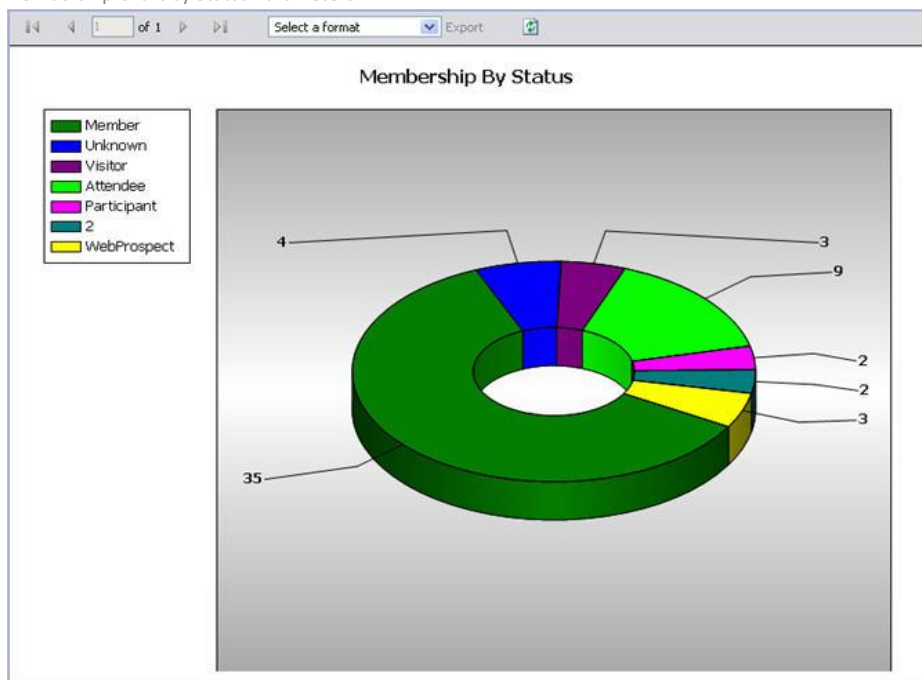
This report enables you to group records by member status, record status, city or state.

Members Parameters

Membership Chart by Status

This report displays all active records by member status in pie graph.

Membership Chart by Status Parameters



NCOA Moved Addresses (Optional)

This report displays all records identified by the MOVE Agent. There are no parameters for this report.

NCOA Move Addresses Report

<u>New Address</u>	<u>Old Address</u>
12345 Memphis, TN 38135	330 Clarington Dr NEWNEW Southaven, MS 38671-5603

New Members

This report identifies new records based on the date entered. Use the Start Date and End Date to narrow your search.

New Members Parameters

StartDate: 9/17/2007 EndDate: 9/24/2007 View Report

1 of 1 Select a format Export

Personal Activity Meter

Use this parameter to select a person's name from the list and to see a graph of the person's Personal Activity Meter (Health Meter).

Persona Activity Meter Parameters

Person: <Select a Value> View Report

Report Options

There are several options associated with viewing or printing reports.

Navigating Through the Pages

You can use the single or double arrows to navigate through a multi-page report.

Report Navigation

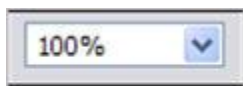


Use the First, Previous, Next, and Last page arrows to move between the pages of the report. You can also enter the desired page number manually. The number listed after the box is the total number of pages in the report. Remember, this is the number of pages displayed on the screen, not necessarily printer pages.

Zoom

Type in or select the percent to increase or decrease the amount of viewable information.

Zoom



Find/Next

Type the information for which you would like to search in this report, and click Find. Arena will highlight the text, when found.

Find/Next



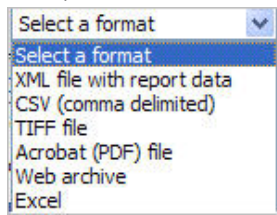
Exporting

Once the desired report displays, select the export format. This creates a file you can open and print using a multitude of programs. Values for this list may vary and are definable under Report Services.



Export Options



Print Options




Refresh and Print

Click the Refresh  icon to rerun the report. Click the Printer  icon to send the information to print on the selected printer.

Refresh and Print



Hide Criteria

Click the  hide icon to hide the selection parameters on the report.

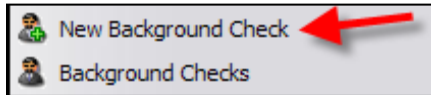
New Background Check (Optional)

Your organization can run and manage background checks all in Arena.

Steps to Request a Basic Background Check:

- 1) Go to **Membership**→**New Background Check**, OR select **Request New Background Check** on the Person Detail Page of the person you would like request a background check.

New Background Check Request

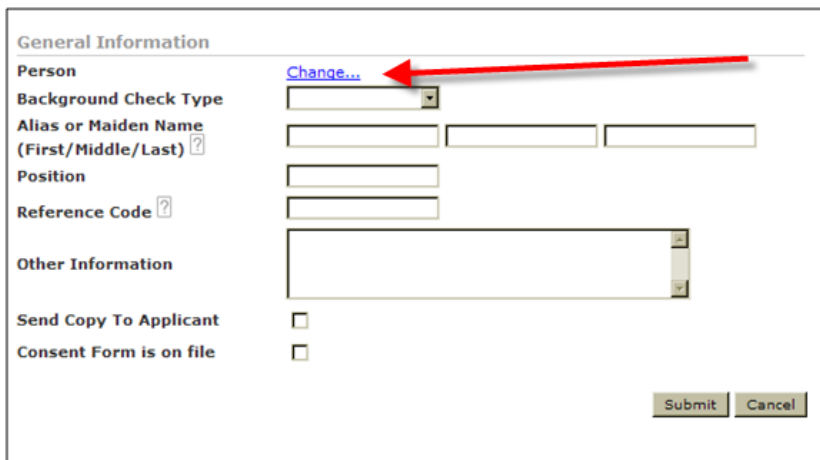


Background Check Request from Person Detail Page



- 2) Click **Change...** to search and select an existing record.

Select a Record



General Information

Person [Change...](#)

Background Check Type

Alias or Maiden Name (First/Middle/Last)

Position

Reference Code

Other Information

Send Copy To Applicant ☐

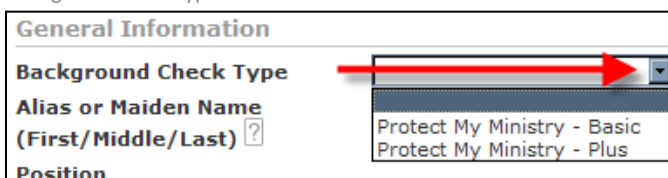
Consent Form is on file ☐



You can submit Background Checks, even if the SSN field is blank or only partially complete. If no SSN is available, you can use 9 numeric characters (e.g. 423578941) or 11 characters that exactly match the formatn (e.g. ###-##-####). *The 9s are only used for Background Check purposes and do not populate the Person Detail information.*

- 3) Select the **Background Check Type**.

Background Check Type



General Information

Background Check Type

Alias or Maiden Name (First/Middle/Last)


Position

Protect My Ministry - Basic
Protect My Ministry - Plus

- 4) Enter **required fields**. *First name, last name, social security number, date of birth and address are required.*

Background Check Request

Person Information (updates the person record!)

Person  Stewie Administrator


First Name

Middle Name

Last Name


Social Security Number


Gender

Birthdate 


Residence
 ,

General Information

Background Check Type 

Alias or Maiden Name (First/Middle/Last) 

Position

Reference Code 

Other Information

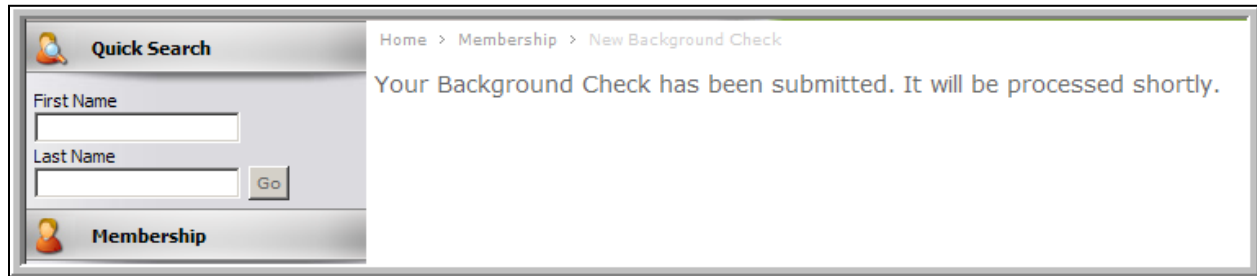
Send Copy To Applicant ☐

Consent Form is on file ☐

- **First Name** – Arena will populate this field using the information on this person's record.
- **Middle Last Name** – Arena will populate this field using the information on this person's record.
- **Last Name** – Arena will populate this field using the information on this person's record.
- **Social Security Number** – Arena will populate this field using the information on this person's record.
If the social security number is not available, enter nine numeric characters (e.g. "432531234") or 11 characters that exactly match the pattern of "###-##-####" where each # is a numeric character and the dashes are at proper intervals.
- **Position**—The position which the person has requested.
- **Reference Code** – This is the code to reconcile with the invoice from the provider.
- **Consent Form is on file** - The option that determines which stage of the consent form.

- 5) Click **Submit** once you enter all information. *If the request needs approval, the Approver receives an e-mail with this request*



Background Check Confirmation



The screenshot shows a web interface for a background check confirmation. On the left, there is a sidebar with a 'Quick Search' section containing input fields for 'First Name' and 'Last Name', and a 'Go' button. Below this is a 'Membership' section with a person icon. The main content area on the right displays a confirmation message: 'Your Background Check has been submitted. It will be processed shortly.' Above this message is a breadcrumb trail: 'Home > Membership > New Background Check'.

The Plus option is below with additional Court Check options. Additional fees may apply.

Plus Option

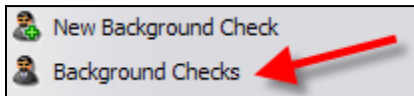
Court Search		 Add Additional Court Check
Type	<input type="text" value="County"/>	
County	<input type="text"/>	
State	<input type="text" value="Alabama"/>	
Special Instructions	<input type="text"/>	
MVR Driving History		 Add Additional MVR Check
License Number	<input type="text"/>	
Issuing State	<input type="text"/>	
Years of History	<input type="text"/>	
National Criminal Database Search		
No Additional Information Required		
National Sex Offender Registry		
No Additional Information Required		
SSN Verification & Address History		
No Additional Information Required		
Credit History		
No Additional Information Required		

Steps to Review All Background Checks:

You can view in process and completed background checks on the Background Checks page.

- 1) Go to **Membership**→**Background Checks**.

Background Checks in Process



- 2) Select the desired filter **parameters** or use the column header to perform a **single-sort** to locate the desired background check.
- 3) Click **Apply Filter**. *Filter parameters will retain for each user.*

Background Checks in Process Listing

Background Checks

Request and Review Background Checks

Status
☐ Rejected
 ☐ Requested
 ☐ Processing
 ☐ Received
 ☐ Completed

Approved

Requested By

Requested On

Apply Filter

Requested On	Requested By	Status	Results
Dan Weinberg [R]	Dan Weinberg [R]	Processing	
Daniel Doe	Mr Stewie Administrator [R]	Processing	
some_Doe	Jane Sample	Rejected	
David Calhoun	David Calhoun	Completed	COMPLETE - Clear

- **Status** – You can filter can a single or multiple background check status.
- **Approved** – You can filter by approved or rejected background checks.
- **Requested By** – You can filter by the background check requestor.
- **Requested On** – You can filter by the background check applicant.

Steps to Process Background Check Requests:

If your organization has security rights set so that all background check requests require approval prior to processing, the person responsible must either approve or reject the request. Once the background check request is approved Arena will e-mail the requestor with an update to their request.

- 1) Go to **Membership** → **Background Checks**.
- 2) Click on the [name](#) of the person for whom a background check is requested to open and review the request.

Background Checks Requested

Requested On	Requested By	Status
Dan Weinberg	Dan Weinberg	Requested

- 3) **Approve, Reject or Edit** as needed. *Users with approval rights can edit all fields.*

Approve, Reject or Edit

Background Check Request Entry

Person Information

Person: [Malcolm Macpherson](#)
 First Name: Malcolm
 Middle Name:
 Last Name: Macpherson
 Social Security Number: ***-**-9999
 Gender: Male
 Birthdate: 4/21/1981
 Residence: 4076 Hatcher Cir Memphis, TN 38118-6814
 Spouse: Jean Macpherson

General Information

Alias or Maiden Name (First/Middle/Last) [?]
 Position:
 Reference Code [?]
 Other Information: TESTING--DO NOT PROCESS
 Send Copy To Applicant: No
 Consent Form is on file: Consent Form confirmed by bbrown on 4/14/2010

National Criminal Database Search

No Additional Information Required

National Sex Offender Registry

No Additional Information Required

SSN Verification & Address History

No Additional Information Required

Once the request is approved, the background check will be processed by the provider and had the status of Processing, as shown below.

Background Check Status

Requested On	Requested By	Status
Johnny Doe	Linda Johnson	Processing

Steps to Approve/Reject Background Checks:

- 1) To view the Background Check report, click on the person's name. The status must be "Received."

Background Check List

Background Checks
Request and Review Background Checks

Home > Membership > Background Checks

Status:
Approved:
Apply Filter

Requested On	Requested By	Status
Bob Smith	Linda Johnson	Received
Betty Smith	Linda Johnson	Received

- 2) Click on **Complete <Clear/Alert>** to view the report. *This is a link to the report located on PMM's secured servers.* Once the report displays, you can also save it on a local location.

Access Background Check Report

Results

External Result: **COMPLETE - Alert**

Result:

Type: Basic

- 3) **View the Report.**

Sample Background Check Report

Protect My Ministry
18940 N. Dale Mabry Hwy., Ste. 101
Phone: (800) 316-5581 Fax: (800) 316-5582

CONFIDENTIAL

Requested: 01/21/09 Printed: 01/23/09

Background Verification Report Completed: 01/21/09

Prepared For: Demo Account 1 Requested By: Linda Johnson

Subject: Smith, Bob SS #: XXX-XX-9999
Address: 1744 Meadow River Cv DOB: 08/15/59
Cordova, TN 38016
Reference: A001 Position: Any

Natl criminal database search


THE FOLLOWING CRIMINAL CASE(S) WERE FOUND ON THE NATIONAL DATABASE INDEX, IN AURORA COUNTY COLORADO USING NAME AND DATE OF BIRTH PROVIDED.

CASE NUMBER: 2006T210994
FILE DATE: 12/08/06

4) Select **Pass** or **Fail**.

Select Pass or Fail

Results	
External Result	COMPLETE - Alert
Result	<div>▼</div>
Type	Pass
Requested By	Fail



- 5) Once you select Pass or Fail, the below page will display, the status will change to “Completed,” the record will update with the Result of **Passed** or **Failed**, and an e-mail will be sent to the requestor with an update to this request.

Page Update

Home > Membership > New Background Check

The Background Check has been updated.


Background Check View

Requested On	Requested By	Status
Johnny Doe	Linda Johnson	Completed
Beulah Smith	Linda Johnson	Completed



Person Detail Page View

Background Checks			
Result	Type	Status Updated	Requested By
Passed	Basic	1/28/2009	Linda Johnson




Family Registration

The Family Registration application is a Click-Once application, meaning it is a workstation-based application. Below are some of the features and benefits of using this application?

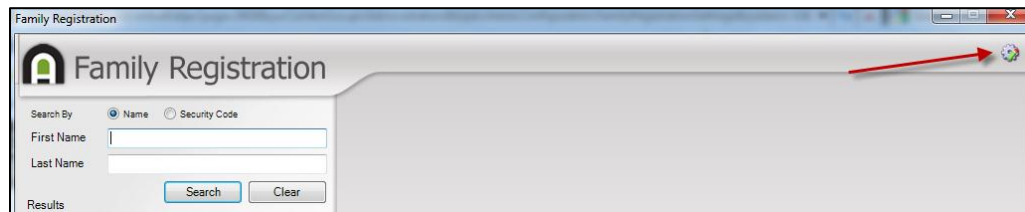
- Users can access the application from any computer on the network.
- Each user can have a unique login. Therefore, it is an ideal application to use to allow volunteers to do data entry work for your organization without going through the hassle of setting them up as a new user on your network.
- The user interface of Family Registrations puts most of the important fields for a record on one page, eliminating the need for data entry personnel to navigate between multiple pages to add or modify a record.
- The Family Registrations application has a built-in control that prevents data entry personnel from accidentally duplicating records.

Before using the application, there are some settings you to review.

Family Registration Settings:

- 1) **Open** Family Registration.
- 2) **Log in**.
- 3) Select the **Application Settings**  icon.

Family Registration Application Settings



Family Registration Application Settings

Application Settings	
Fingerprint Scanner	
BioScannerInstallationDirectory	C:\Program Files\BioPlugin
BioScannerServer	
General	
Allow Check-In	True
Attribute Groups	16
Default Campus	
Default Member Status	
FirstTimeVisitAttribute	
Image Path	
Organization	1
Prompt for Assigned Cards	True
Search by Security Code	False
Timeout Minutes	5
Group Options	
Active Groups Only?	True
Category ID	1
Field Security Enabled	True
Location Filtering Options	
Enable Location Filtering	False
Occurrence Type ID	-1
System ID	-1
Printer	
Printer Horizontal Offset	
Printer Margin Bottom	
Printer Margin Left	
Printer Margin Right	
Printer Margin Top	
Printer Name	
Printer Orientation	Landscape
Printer Page Width	4.0
Printer Paper Height	2.0
Printer Vertical Offset	
Active Groups Only? The boolean value that indicates if only active groups should be displayed.	
<div>OK</div> <div>Cancel</div>	

Fingerprint Scanner

- File location where the images are stored.
- The name of the scanner.

General

- Allow Check-In – Set this to true to allow users to Check-In saved records.
- Attribute Groups – Enter the Attribute IDs of the values to make available.
- Default Campus – If using multiple campuses, set the Campus ID, as desired.
- Default Member Status – Enter the default member status for each record added.
- FirstTimeVisit Attribute – Enter the Attribute ID to be applied for each new record.
- Image Path – Enter the file path for photos.
- Organization – Enter the Organization value, if not set by default.
- Prompt for Assigned Cards – Set to True if your organization uses member cards.
- Search by Security Code – Set to True enables searching for records using security codes.
- Timeout Minutes – Enter the number of minutes to automatically log off, when application is not used.

Group Options

- Active Groups Only – Set to True to only display active Groups, for Check-In.
- Category ID – Set the Small Group Category IDs to use for Check-In.
- Field Security Enabled – Set to True to enable Arena to secure fields, based on Security Roles.
- Enable Location Filtering Options – Set to True to enable Location filtering for Check-In.
- Occurrence Type ID – Enter the Occurrence Type ID value, if different from the default.

Location Filtering

- Enable Location Filtering – Set to True if you would like to restrict Family Registration by Location, by work-station.
- Occurrence Type ID – Set the default Occurrence Type ID for this work-station.
- System ID – Set the System ID, if different from the default.

Printer

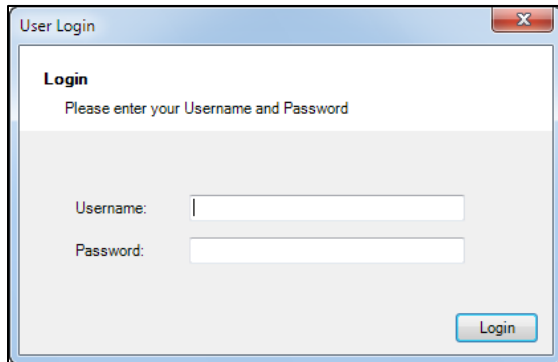
- Set printer options, as desired for hardware and label output.

4) Select **OK**. *The application will restart in order for any application setting changes to take effect.*

Steps to Use Family Registration

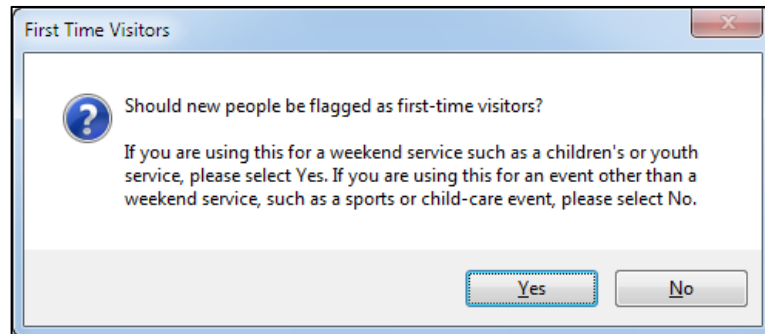
- 1) **Open** Family Registration.
- 2) **Log in**.
- 3) When opening Family Registration for the first time on this work station, you will have the opportunity to save a **desktop shortcut**.
- 4) Enter **Username** and **Password**. *For users who already have an Arena Username and Password, this will be the same.*

Family Registration User Login

A Windows-style dialog box titled "User Login" with a close button (X) in the top right corner. The dialog has a light blue header bar. Below the header, the word "Login" is displayed in bold. Underneath, it says "Please enter your Username and Password". There are two text input fields: "Username:" and "Password:". A "Login" button is located at the bottom right of the dialog.

- 5) Click **Login**.
- 6) Select how Arena should **flag first time visitors**. *The First Time Visitor report in Membership will consist of records flagged.*

First Time Visitors Flag

A Windows-style dialog box titled "First Time Visitors" with a close button (X) in the top right corner. The dialog has a light blue header bar. Below the header, there is a question mark icon followed by the text "Should new people be flagged as first-time visitors?". Below this, a paragraph of text provides instructions: "If you are using this for a weekend service such as a children's or youth service, please select Yes. If you are using this for an event other than a weekend service, such as a sports or child-care event, please select No." At the bottom right, there are two buttons: "Yes" and "No".

- 7) Use the **Quick Search** fields to first search for the record to be sure it does not already exist.

Family Registration Quick Search

A web form titled "Family Registration" with a logo on the left. Below the title, there is a "Search By" section with two radio buttons: "Name" (selected) and "Security Code". Below this, there are two text input fields: "First Name" with the value "jane" and "Last Name" with the value "sample". At the bottom, there are two buttons: "Search" and "Clear". Below the buttons, there is a "Results" label.

- 8) If the same name already exists, these records will display for you to review. You can select any record for additional information to display in the Person Details window.

Family Registration People Search

Person Search

First Name Last Name sample Search Person ID Search ID Envelope Number Search

Search Results

First Name	Last Name
Bill	Sample
Jane	Sample
Jane	Sample
Joan	Sample
John	Sample

Person Details

Jane Sample

ID 352
 Foreign Key 0
 Member Status Member
 Record Status Active
 Campus Campus 1
 Birth Date 10/3/1966
 Age 43
 Gender Female
 Marital Status Married
 Contribute With Spouse
 Envelope Number
 Home Phone (901) 757-2372
 Business Phone
 Cell Phone

Spouse
[John Sample](#)

E-mail
 linda.johnson@arenachms.com

Address
 7345 Goodlett Farms Pkwy
 Cordova, TN 38015-4990

Added By linda on 4/25/2010
 Modified By jsample on 4/29/2010
 Last Verified 4/29/2010

Add New Edit Select Cancel

- 9) Click **Add New Family** to enter information for the new person. *You can enter children with no adults.*
- 10) Enter the first and last name, and birth date. If you enter a name and birth date that matches an existing record, the below error message will display.

New Family with Possible Duplicates

New Family

Adults

First Last Birth Date Gender

Jane Sample 10/03/1966 Female

04/25/2010 Male Female

☐ I have reviewed all the possible duplicates

Children

First Last Birth Date Gender

04/25/2010 Male Female

04/25/2010 Male Female

Possible Duplicates

There are possible duplicates that you need to verify before saving this new family.

OK

Assigned Card OK Cancel

- 11) Click **OK**.

- 12) Click the **Possible Duplicates** icon to view additional information of the records.

Possible Duplicates

The screenshot shows the 'New Family' window with the 'Adults' section. The 'Possible Duplicates' icon is highlighted with a red arrow. The 'I have reviewed all the possible duplicates' checkbox is unchecked.

Adults ☐ I have reviewed all the possible duplicates

First: Jane, Last: Sample, Birth Date: 10/03/1966, Gender: Female

First: , Last: , Birth Date: 04/11/2011, Gender: Male

Possible Duplicates icon (highlighted with a red arrow)

- 13) You can select any record and it will display in Family Registration, or click **Close** to enter a new record.

Possible Duplicate Window

The screenshot shows the 'Possible Duplicates' window. It displays a table of possible duplicates for Jane Sample. The table has columns for Name, Phone Number, Email, and Address. The first row is highlighted in blue.

The following are possible duplicates for Jane Sample.

Name	Phone Number	Email	Address
Sample, Jane	(901) 757-2372	linda.johnson@arenachms.com	7345 Goodlett Farms Pkwy

If the person you are adding is in this grid, double click their row to be taken to their details page

Close

- 14) Click the **"I have reviewed all possible duplicates"** box.

Confirm Review for Duplicates

The screenshot shows the 'New Family' window with the 'Adults' section. The 'I have reviewed all the possible duplicates' checkbox is checked. The 'Possible Duplicates' icon is visible.

Adults ☒ I have reviewed all the possible duplicates

First: Jane, Last: Sample, Birth Date: 10/03/1966, Gender: Female

First: , Last: , Birth Date: 04/25/2010, Gender: Male

Possible Duplicates icon

- 15) Click **OK** to proceed with adding the new record or family. *You can enter children without an adult.*

Adding a New Person or Family

New Family

Adults

First	Last	Birth Date	Gender
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input checked="" type="radio"/> Male <input type="radio"/> Female
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input checked="" type="radio"/> Female

Children

First	Last	Birth Date	Gender	Grade	Class Of
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="06/30/2009"/>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text"/>	<input type="text"/>

Assigned Card

OK **Cancel**

In the **New Family** page, fill in the first and last name for every family member. Arena allows one adult male and one adult female in a family, so it is important to enter the appropriate name in the corresponding line for the adults of a family. All other persons you add to a family are with the role of “Child”, but you can make changes within their records in the Arena application. Enter a birth date, if available. You must select a gender for each person. Once you enter all family members, scan/swipe a check-in card for the family, the card ID number will show as the Assigned Card number for that family. Click **OK** when done.

Family Information

Sample Family

Johnny
Jane
Sam - 2
Jack
Pete
Kate
Add New Person

Personal Information

First Name	<input type="text" value="John"/>	Family Role	<input type="text" value="Adult"/>
Last Name	<input type="text" value="Sample"/>	Gender	<input type="text" value="Male"/>
Nick Name	<input type="text" value="Johnny"/>	Marital Status	<input type="text" value="Married"/>
Birthdate	<input type="text" value="06/14/1948"/>	Grade/Class Of	<input type="text" value=""/>

Contact Information

Home Phone	<input type="text" value="(901) 757-2372"/>	Work Phone	<input type="text" value="(901) 789-4561"/>
Cell Phone	<input type="text" value="(901) 757-7845"/>	Other Phone	<input type="text" value=""/>
E-mail	<input type="text" value="jsample@yahoo.com"/>		

Home Address

Street	<input type="text" value="7345 Goodlett Farms Pkwy"/>		
City/St/Zip	<input type="text" value="Cordova"/>	TN	<input type="text" value="38016-4990"/>
Country	<input type="text" value="United States"/>		

[Standardize](#)

Photo

Relationships

Relationship:

Membership Details

Date Joined	<input type="text" value="04/11/2011"/>
Baptism Date	<input type="text" value="04/11/2011"/>
Visit Dates	
First Activity	<input checked="" type="checkbox"/> 03/08/2010
First Visit	<input type="text" value="04/11/2011"/>
Second Visit	<input type="text" value="04/11/2011"/>

Cards Assigned

Person family members will display as separate tabs along the top of the page in chronological order by age. Arena generally considers the oldest adult member of a family the “Head of House”, so the Head of House will be the initial tab. Click on any name to view the specific information about that person.



- Arena will format 10-digit telephone numbers.
- Editing the home phone or address of an adult will propagate for all family members.
- **See your Arena Administrator regarding Relationships and the available Member fields.**

Assigning a Check-In card

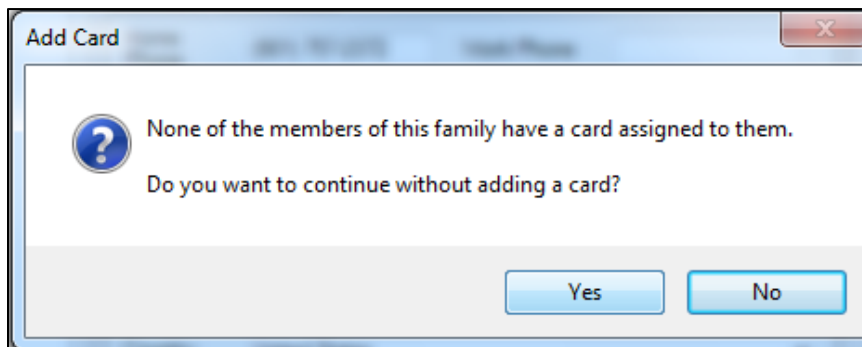
Check-In can use a barcode or magnetic stripe card to make it easy to select the correct family. When viewing the Family Information page, simply scan the barcode or swipe the stripe of the card at any time. This will enter the code in the Cards Assigned section. All cards assigned to a person will work for all members of a family. You can have multiple cards, if desired. Click the **Unassign Card** button to remove a card.

Adding a Photo

While you can view an image on file for a person, you cannot change the photo at this time.

- 16) Click **Save**. If your organization uses cards and you haven't assigned a card to the new person, the *Add Card* pup-up will display.

Add Card



- 16) Click **Yes**, to continue without assigning a card.
17) After saving the record, you will have the option to check him or her **Check-In** or **Add to Group**.

Check-In Options

Home Address			
Street	7345 Goodlett Farms Pkwy		<input type="button" value="Check In"/> <input type="button" value="Add to Group"/>
City/St/Zip	Cordova, TN	38016-4990	
Country	United States		
			Standardize



- Arena will format 10-digit phone numbers.
- You can standardize U.S. addresses without saving the record.
- If you enter an international address, you do not need to enter the city, state and zip.

18) If you select Check In, you can select the appropriate **Attendance Type Occurrence(s)**.

Available Occurrences

The screenshot shows a dialog box titled "Check-In". Inside, there is a section labeled "Available Occurrences" which contains a list box with one item: "8:00 AM General Attendance Type (Tropical Paradise)". This item is selected, indicated by a checkmark in a small box to its left. Below the list box, there is a "Pager:" label followed by an empty text input field. To the right of the input field is a "Check In" button. At the bottom right of the dialog, there is a checkbox labeled "Set check-in default selection" which is also checked.

19) Click **Check In**. *You can also set the default Attendance Type Occurrence for this person.*

20) This pop-up window will also display where the person as is currently **Checked In**.

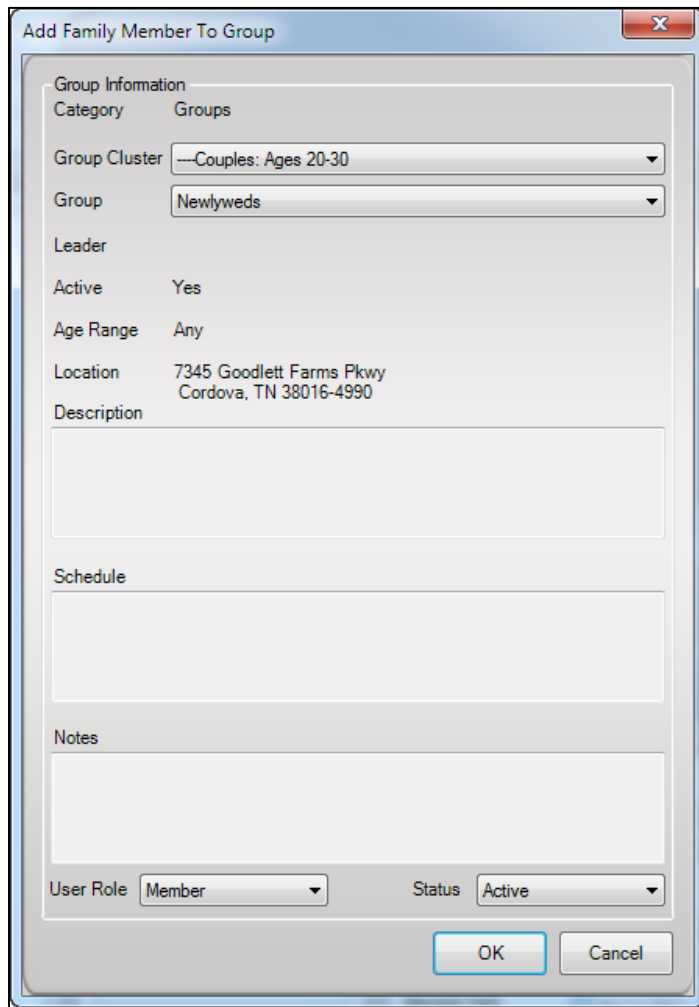
Currently Checked Into

The screenshot shows a dialog box titled "Currently Checked Into". Inside, there is a list box with one item: "8:00 AM General Attendance Type (Tropical Paradise)". This item is selected, indicated by a checkmark in a small box to its left. At the bottom right of the dialog, there is a "Check Out" button.

21) Click **Close**.

- 22) If you select Add to Group, you can select the **Group Cluster** and existing **Group**.
- 23) Select **User Role** and **Status**.

Add Family Member to an Existing Group

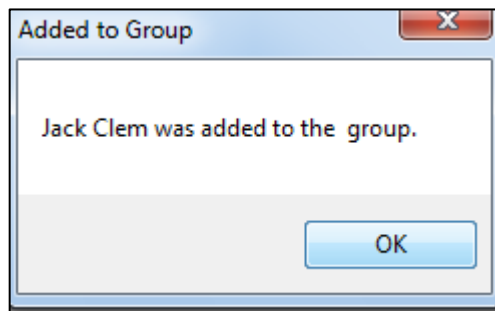


The dialog box titled "Add Family Member To Group" contains the following fields and options:

- Group Information**
 - Category: Groups
 - Group Cluster: ---Couples: Ages 20-30 (dropdown)
 - Group: Newlyweds (dropdown)
 - Leader: (empty field)
 - Active: Yes
 - Age Range: Any
 - Location: 7345 Goodlett Farms Pkwy, Cordova, TN 38016-4990
 - Description: (empty text area)
- Schedule**: (empty text area)
- Notes**: (empty text area)
- User Role**: Member (dropdown)
- Status**: Active (dropdown)
- Buttons: OK, Cancel

- 24) Click **OK**.
- 25) The **Group Confirmation** will display.

Group Confirmation



The dialog box titled "Group Confirmation" displays the message:

Jack Clem was added to the group.

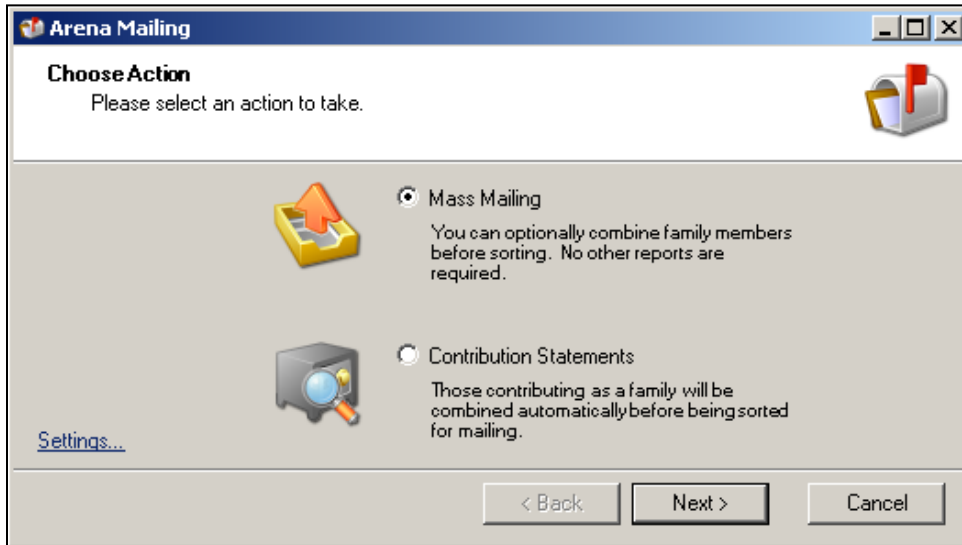
There is an OK button at the bottom right.

- 26) Click **OK**.

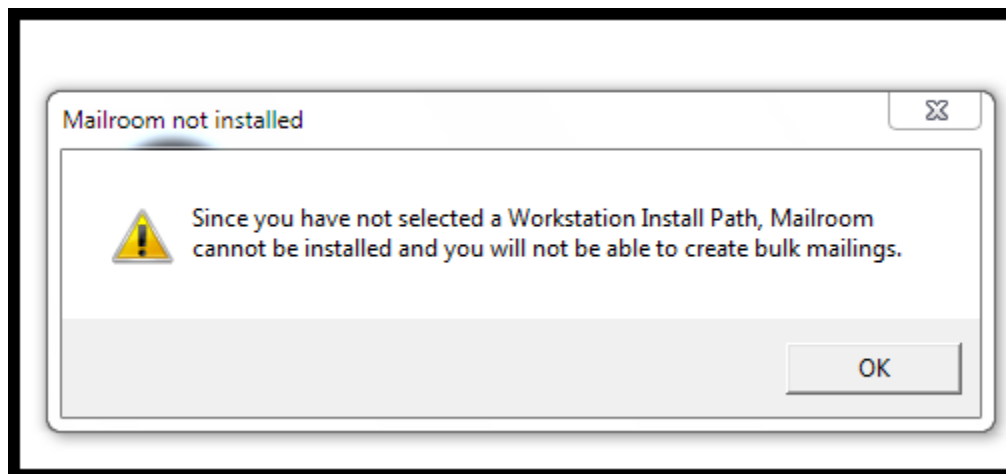
Mailing

The Mailing application is a Click Once application that allows the user to run bulk mail presorts for mass mailings, printed contributions statements or emailed contribution statements. ***A Shelby Mailroom subscription is required for bulk mailings, but not for emailing contribution statements.***

If launching Mailing from a network workstation, the below window will display.



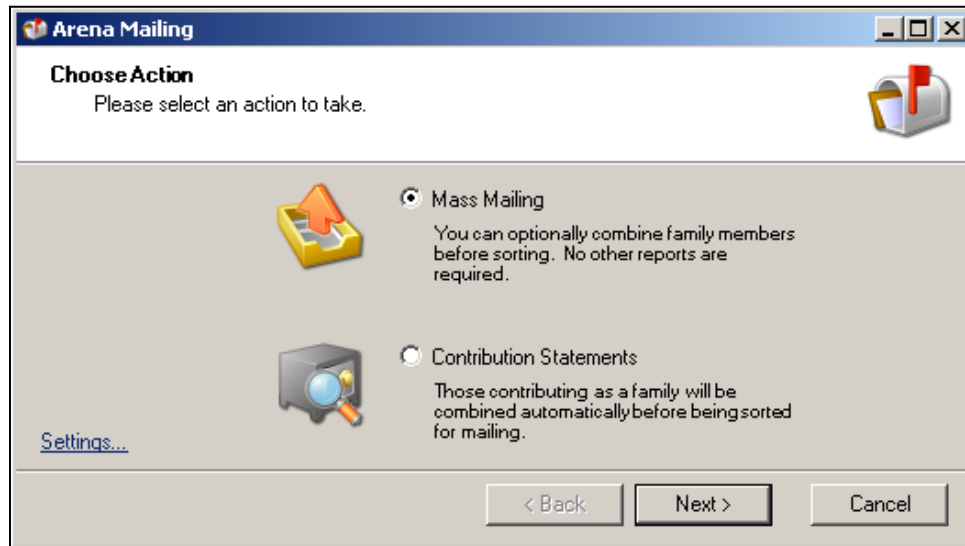
If launching Mailing from a non-network workstation, the below window will display where you can still Contribution statements.



Steps to Manage Mailing Settings:

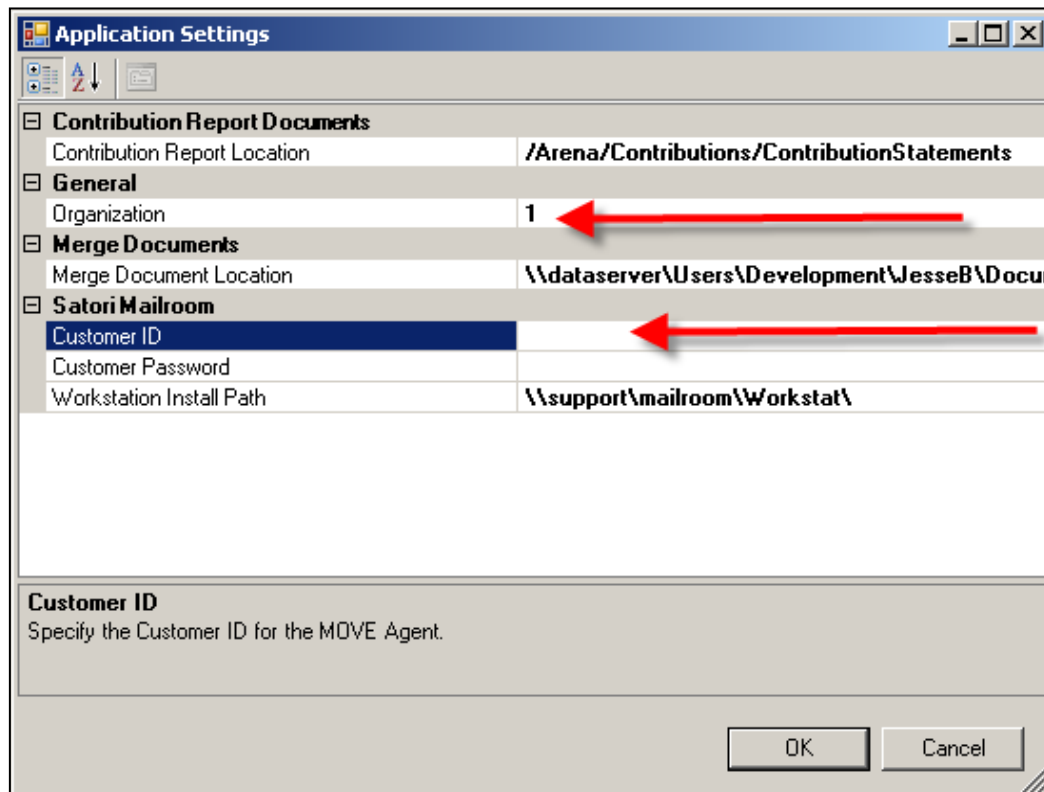
- 1) Go to **Membership** → **Mailing** to open the click-once application.
- 2) Click [Settings](#).

Mailing



- 3) Edit the Mailing Settings to insure the Organization and Customer ID are correct, if needed. If updated, you will need to restart the application.

Application Setting



Steps to Email Contribution Statements:

- 1) Verify **Email Contribution Statement agent** is running.
- 2) Customize **Contribution System e-mail**.
- 3) Verify all **Mailing Application settings**.
- 4) Verify all **recipients** have a valid e-mail address.
- 5) Verify **Email Statement** and **PIN Number** fields are complete for each recipient.

Contribution Information

Contribution Information	
Last Contribution Date:	8/24/2010
Contribute Individually:	<input checked="" type="checkbox"/>
Print Statement:	<input checked="" type="checkbox"/>
Email Statement:	<input checked="" type="checkbox"/>
PIN Number:	<input type="text" value="0922"/>
Envelope Number:	<input type="text" value="11000"/> <input checked="" type="checkbox"/> Include in File
Save Cancel	

- 6) Open the **Mailing** application.
- 7) Select **Email Contribution Statement**.

Arena Mailing

Arena Mailing

Choose Contribution Statement Type
Select whether you want to print or email contribution statements

☒ **Email Contribution Statement**
This will walk you through the steps to Email contribution statements to all or a list of people

☐ **Print Contribution Statements**
This will walk you through the steps to print contribution statements for mailing

< Back Next > Cancel

- 8) Click Next.

- 9) Select **Contacts**. You can select all membership or from a previously created lists.

Select Email Contacts

The screenshot shows the 'Select Email Contacts' dialog box within the 'Arena Mailing' application. The title bar reads 'Arena Mailing'. The main heading is 'Select Email Contacts' with a sub-instruction: 'Select the members you wish to Email contribution statements to.' There are two radio button options: 'All Membership' (which is selected) and 'From a List'. Below the 'From a List' option is a dropdown menu showing 'Advanced List test for Query Query Loc'. At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'.

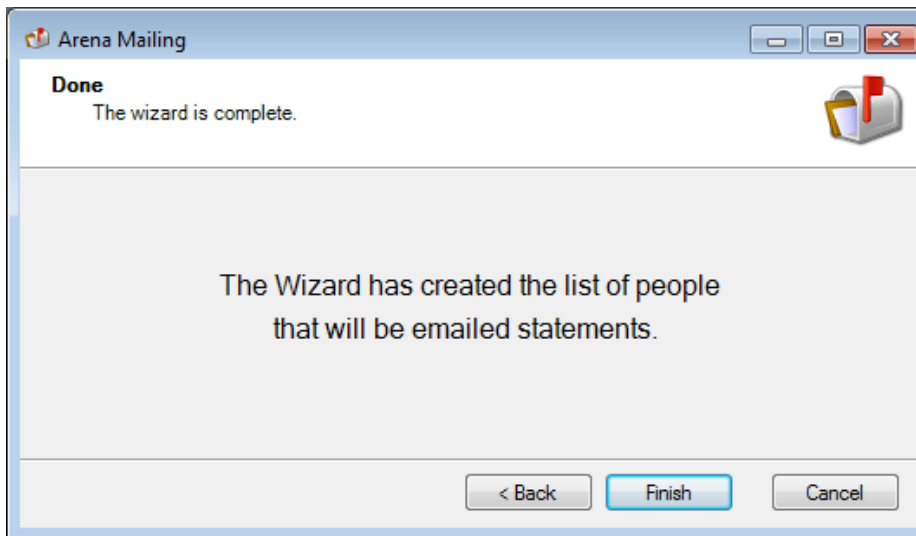
- 10) Click **Next**.
11) Select **Filter Options**.

Filter Options

The screenshot shows the 'Filter' dialog box within the 'Arena Mailing' application. The title bar reads 'Arena Mailing'. The main heading is 'Filter' with a sub-instruction: 'Select Filter Options'. The dialog contains several filter criteria: 'From' (11/ 8/2009) and 'Through' (11/ 8/2010), both with calendar icons; 'Fund One' (Passage Fund) and 'Fund Two' (Davids Fund for Statements), both with dropdown arrows; 'Minimum Gift' (0) with a checkbox for 'Minimum Gift Based on Dates'; and a checkbox for 'Include People who Pledged but didn't give'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

- 12) Click **Next**.

13) Click **Finish**. Arena will email statements, based on the Agent schedule.

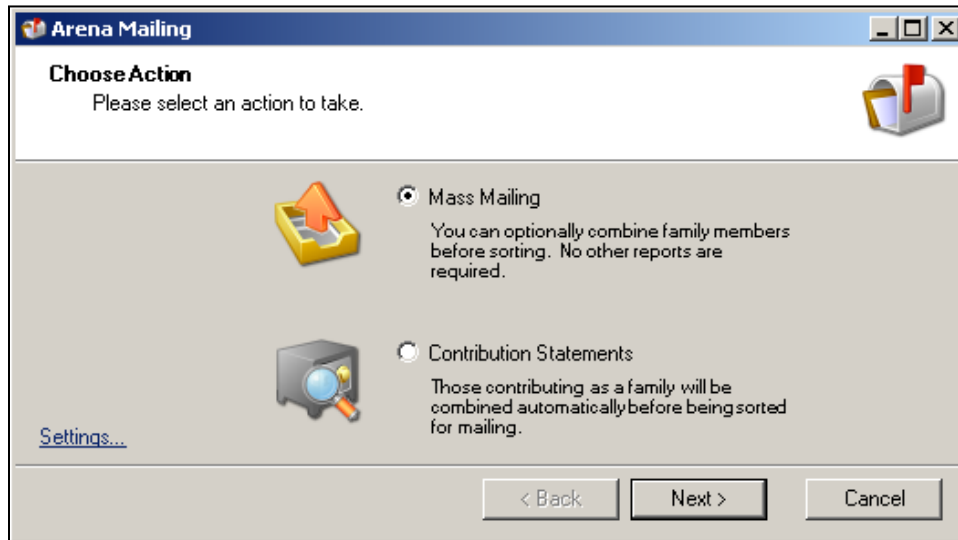


Steps to Create a Mailing using CASS Certify:

You can run a mailing list using either the entire database or an existing list. **You must have a minimum of 200 person addresses in order to create a bulk mailing.**

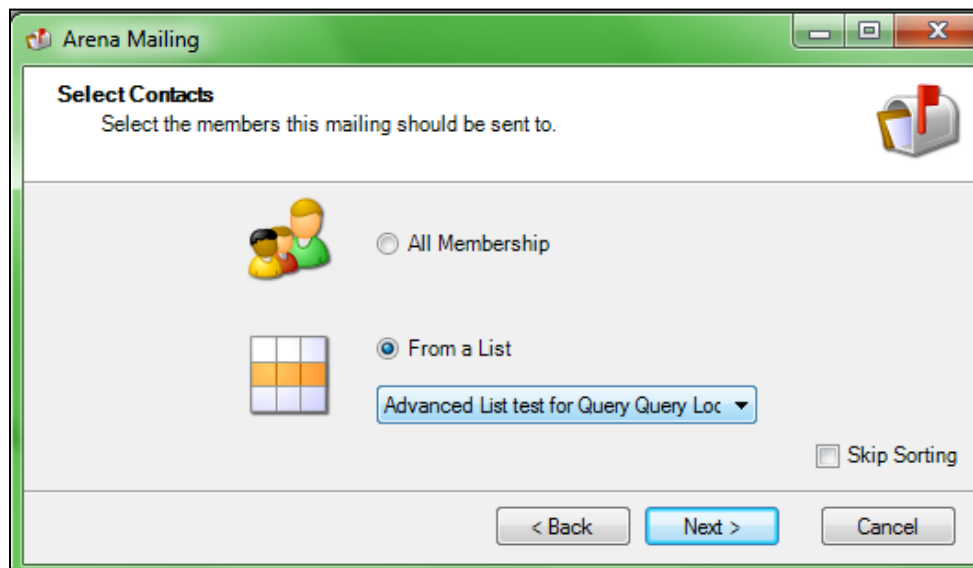
- 1) Open the **Mailing** application.
- 2) Select **Mass Mailing**.


Mass Mailing-All Membership



- 3) **Select the records** to include in this mailing, either All Membership or an existing List. *The option to Skip Sorting allows you to skip the bulk mail presort process.*

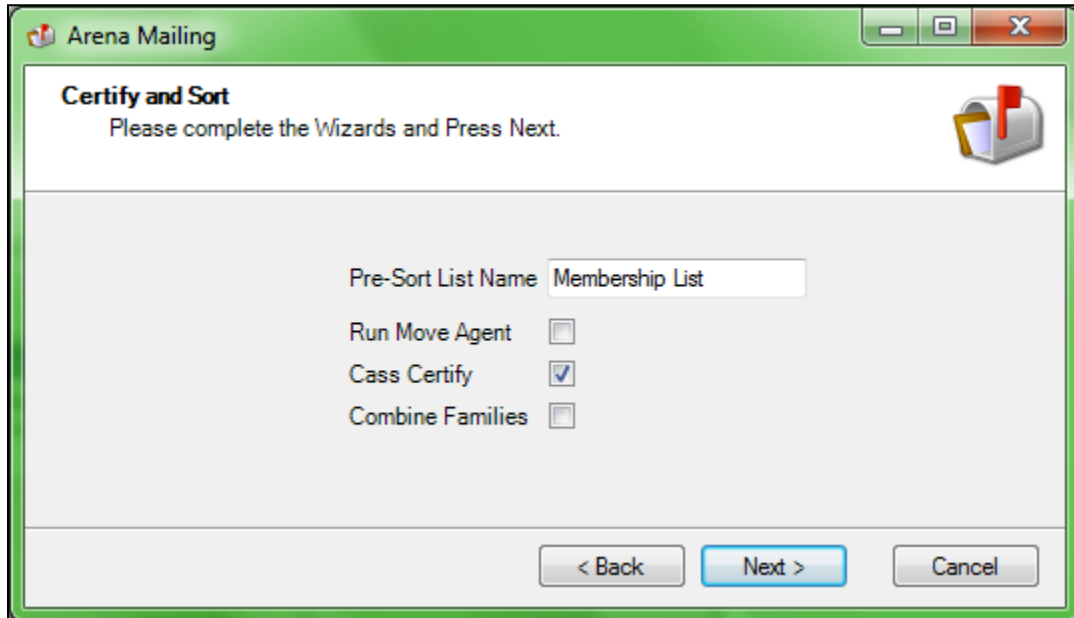
Select Contacts



 The Mailing application displays Person and Parent Lists only, in alphabetical order, when choosing the recipients from a mailing list.

4) Select your **Cass Certify**.

Certify and Sort Options



Arena Mailing

Certify and Sort
Please complete the Wizards and Press Next.

Pre-Sort List Name: Membership List

Run Move Agent ☐

Cass Certify ☒

Combine Families ☐

< Back Next > Cancel

- **Run Move Agent** – This will update all records based on the most recent Shelby Mailroom DVD update. *At least 100 records are required.* When you select Run Move Agent, Arena automatically selects Cass Certify.
- **CASS Certify** – This will certify all selected addressed, based upon the most recent Shelby Mailroom update.
- **Combine Families** – This option will combine individuals living at the same address.



Arena offers a CASS Certify option on the Pre-Sort option. When you select the Move Agent, Arena selects CASS Certify automatically. Any number of addresses can be CASS Certified.

- 5) Once CASS Certify is complete, you can **view**, **print** or **save** the report.

CASS Certify Report

UNITED STATES POSTAL SERVICE®		This form may be generated as the output of address matching processing using CASS Certified™ software in conjunction with current USPS® address database files. Any facsimile must contain the same information in the same format as the printed form.	
CASS™ Summary Report			
See DMM® Section 708 for more information.			
A. Software			
CASS A1	1. CASS Certified Company Name Satori Software, Inc.	2. CASS Certified Software Name & Version MailRoom ToolKit v2.7.0.M	3. Configuration WIN
	4. Z4Change Certified Company Name	5. Z4Change Certified Software Name & Version	6. Configuration
	7. DirectBPV™ Certified Company Name	8. DirectBPV Certified Software Name & Version	9. Configuration
	10. eLOT® Certified Company Name Satori Software, Inc.	11. eLOT Certified Software Name & Version MailRoom ToolKit v2.7.0.M	12. Configuration WIN
MASS A2	1. MASS™ Certified Company Name	2. MASS Certified Software Name, Version & Model No.	3. Configuration
			4. MLOCR Serial No.
B. List			

- 6) Click **Close** to return to the Mailing Wizard.

Address Correction Window

Address Correction Progress

Job Information

ZIP+4 Data Files Date: October 2009

Elapsed Time: 00:02:36

Total Records: 189

Time Remaining: 00:00:54

Records Processed: 140

74%

Statistics

CASS:

ZIP+4 Coded: 91 65%

eLOT Assigned: 91 65%

Foreign/Errors: 49 35%

Record Type:

Street: 67 48%

PO Box: 0 0%

Firm: 0 0%

High Rise: 4 3%

Exact: 20 14%

Default: 0 0%

Rural Route: 0 0%

Exact: 0 0%

Default: 0 0%

Gen Delivery: 0 0%

DPV:

Primary Unconfirmed: 25 18%

Primary Confirmed: 71 51%

Valid Secondary: 0 0%

Invalid Secondary: 20 14%

Report

Address Correction (PS Form 3553)

Preview

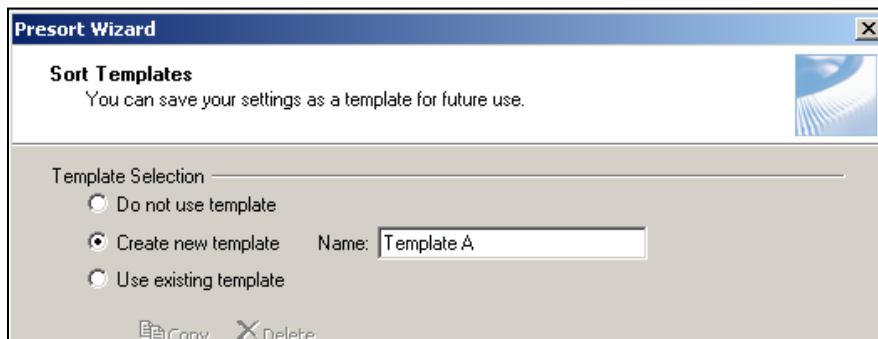
Print...

Save As PDF...

Close

- 7) Select **Create New Template**, if a template does not exist. *The new template will be available for future mailings.*

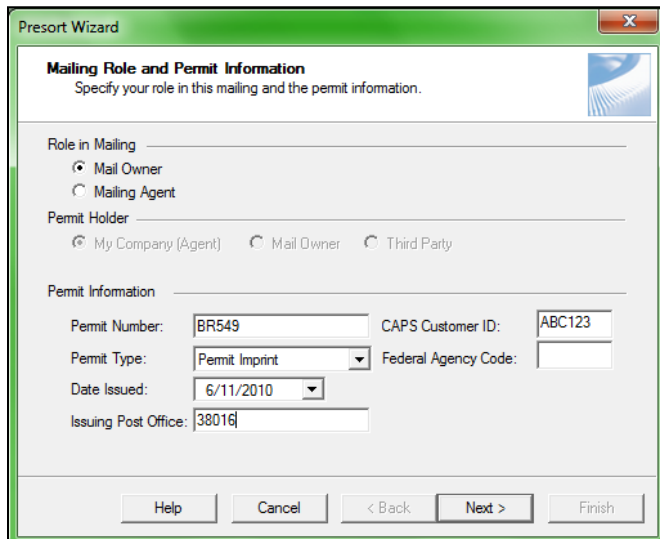
Sort Template



The screenshot shows the 'Presort Wizard' window with the 'Sort Templates' tab selected. The window title is 'Presort Wizard'. Below the title bar, the text reads 'Sort Templates' and 'You can save your settings as a template for future use.' There is a 'Template Selection' section with three radio buttons: 'Do not use template', 'Create new template' (which is selected), and 'Use existing template'. To the right of the 'Create new template' option is a text box labeled 'Name:' containing the text 'Template A'. At the bottom of the window, there are 'Copy' and 'Delete' buttons.

- 8) Enter the **permit information** for your organization.

Permit Information

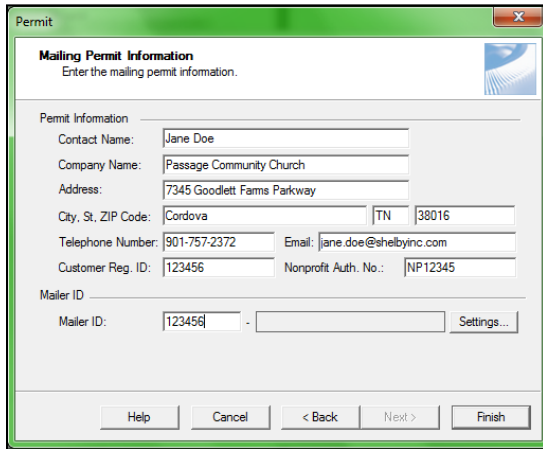


The screenshot shows the 'Presort Wizard' window with the 'Mailing Role and Permit Information' tab selected. The window title is 'Presort Wizard'. Below the title bar, the text reads 'Mailing Role and Permit Information' and 'Specify your role in this mailing and the permit information.' There is a 'Role in Mailing' section with two radio buttons: 'Mail Owner' (selected) and 'Mailing Agent'. Below that is a 'Permit Holder' section with three radio buttons: 'My Company (Agent)' (selected), 'Mail Owner', and 'Third Party'. The 'Permit Information' section contains several fields: 'Permit Number:' with the value 'BR549', 'CAPS Customer ID:' with the value 'ABC123', 'Permit Type:' with a dropdown menu showing 'Permit Imprint', 'Date Issued:' with a date picker showing '6/11/2010', and 'Issuing Post Office:' with the value '38016'. At the bottom of the window, there are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

- 9) Click **Next**.

10) Enter the **Mailing Permit Information** for your organization.

Mailing Permit Information



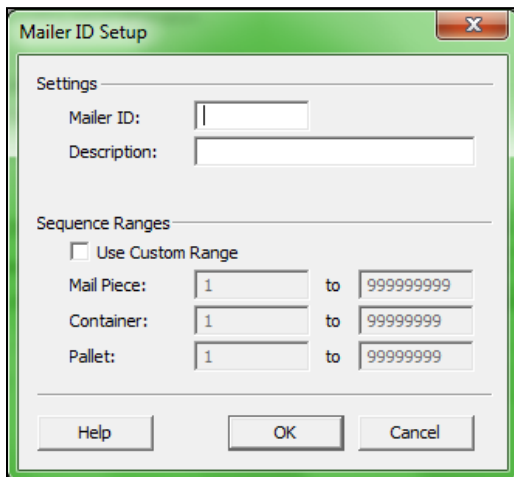
The 'Mailing Permit Information' dialog box is titled 'Permit' and contains a section for 'Mailing Permit Information' with the instruction 'Enter the mailing permit information.' The fields are as follows:

Contact Name:	Jane Doe		
Company Name:	Passage Community Church		
Address:	7345 Goodlett Farms Parkway		
City, St, ZIP Code:	Cordova	TN	38016
Telephone Number:	901-757-2372	Email:	jane.doe@shelbyinc.com
Customer Reg. ID:	123456	Nonprofit Auth. No.:	NP12345
Mailer ID:			
Mailer ID:	123456		Settings...

Buttons at the bottom: Help, Cancel, < Back, Next >, Finish.

11) Click **Settings...** to enter the Mailer ID for your organization.

Mailer ID Setup



The 'Mailer ID Setup' dialog box has two sections: 'Settings' and 'Sequence Ranges'.

Settings:

Mailer ID:	
Description:	

Sequence Ranges:

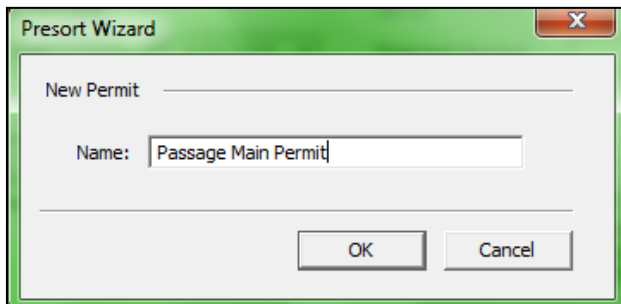
☐ Use Custom Range

Mail Piece:	1	to	999999999
Container:	1	to	999999999
Pallet:	1	to	999999999

Buttons at the bottom: Help, OK, Cancel.

12) Enter a **name** for this permit.

Permit Name



The 'Presort Wizard' dialog box has a section for 'New Permit' with a 'Name' field containing 'Passage Main Permit'.

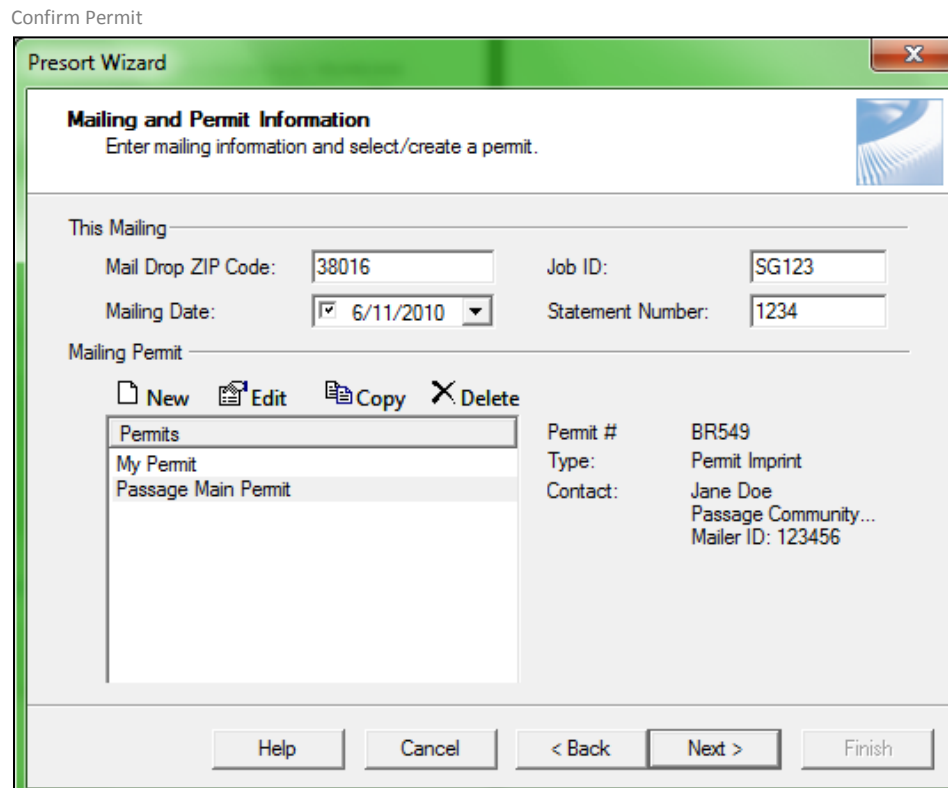
Name:	Passage Main Permit
-------	---------------------

Buttons at the bottom: OK, Cancel.

13) Click **Finish**.

14) **Confirm** the permit for this mailing.

Confirm Permit



The screenshot shows the 'Presort Wizard' window with the 'Mailing and Permit Information' tab selected. The window title is 'Presort Wizard'. The subtitle is 'Mailing and Permit Information' with the instruction 'Enter mailing information and select/create a permit.' Below this, there are two sections: 'This Mailing' and 'Mailing Permit'. In the 'This Mailing' section, there are four input fields: 'Mail Drop ZIP Code' (38016), 'Job ID' (SG123), 'Mailing Date' (6/11/2010), and 'Statement Number' (1234). In the 'Mailing Permit' section, there are four icons: 'New', 'Edit', 'Copy', and 'Delete'. Below these icons is a list box containing 'Permits', 'My Permit', and 'Passage Main Permit'. To the right of the list box, there are four labels: 'Permit #', 'Type', 'Contact', and 'Mailer ID', each followed by a value: 'BR549', 'Permit Imprint', 'Jane Doe', and 'Passage Community...'. At the bottom of the window, there are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

Presort Wizard

Mailing and Permit Information
Enter mailing information and select/create a permit.

This Mailing

Mail Drop ZIP Code: 38016 Job ID: SG123

Mailing Date: 6/11/2010 Statement Number: 1234

Mailing Permit

New Edit Copy Delete

Permits
My Permit
Passage Main Permit

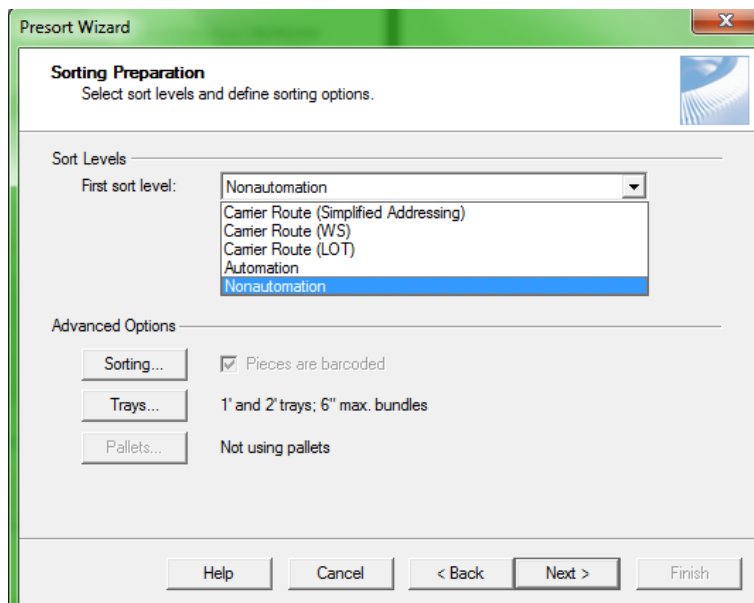
Permit # BR549
Type: Permit Imprint
Contact: Jane Doe
Passage Community...
Mailer ID: 123456

Help Cancel < Back Next > Finish

15) Click **Next**.

16) If you did not select skip sorting, select the desired **first level sorting option**.

17) If desired, select **Sorting...** for Advanced sorting options.



The screenshot shows the 'Presort Wizard' window with the 'Sorting Preparation' tab selected. The window title is 'Presort Wizard'. The subtitle is 'Sorting Preparation' with the instruction 'Select sort levels and define sorting options.' Below this, there are two sections: 'Sort Levels' and 'Advanced Options'. In the 'Sort Levels' section, there is a 'First sort level:' label followed by a dropdown menu. The dropdown menu is open, showing a list of options: 'Nonautomation', 'Carrier Route (Simplified Addressing)', 'Carrier Route (WS)', 'Carrier Route (LOT)', 'Automation', and 'Nonautomation' (highlighted). In the 'Advanced Options' section, there are three buttons: 'Sorting...', 'Trays...', and 'Pallets...'. To the right of these buttons, there are three lines of text: 'Pieces are barcoded' (with a checked checkbox), '1' and 2' trays; 6" max. bundles', and 'Not using pallets'. At the bottom of the window, there are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

Presort Wizard

Sorting Preparation
Select sort levels and define sorting options.

Sort Levels

First sort level: Nonautomation

Carrier Route (Simplified Addressing)
Carrier Route (WS)
Carrier Route (LOT)
Automation
Nonautomation

Advanced Options

Sorting... Trays... Pallets...

Pieces are barcoded
1' and 2' trays; 6" max. bundles
Not using pallets

Help Cancel < Back Next > Finish

18) Click **Next**.

19) Select **mailing type**.

Mailing Types

Presort Wizard

Mailing Type
Select the type of mailing to perform.

Mailing Type

☒ **Postnet**
Select this option if mail pieces will be Postnet barcoded or not barcoded.

☐ **Basic Intelligent Mail**
This option requires Intelligent Mail barcodes on mail pieces.

Help Cancel < Back Next > Finish

- **Postnet** – This option is for mailings not using barcodes.
- **Basic Intelligent Mail** – This option is for mailings.

20) Click **Next**.21) Select **sort class** and **piece type**.

Sort Class and Piece Type

Presort Wizard

Sort Class and Piece Type
Select a presort class and type of mail piece.

Machinable Postcards (Double)
Nonmachinable Letters
Nonmachinable Flats
Parcels
Periodicals
Machinable Letters
Machinable Flats (AFSM 100)
Machinable Flats (UFSM 1000)
Nonmachinable Letters
Nonmachinable Flats
Parcels
Standard Mail
Machinable Letters
Machinable Flats

Envelopes and other pieces that can be processed on Postal Service equipment and meet the following requirements:

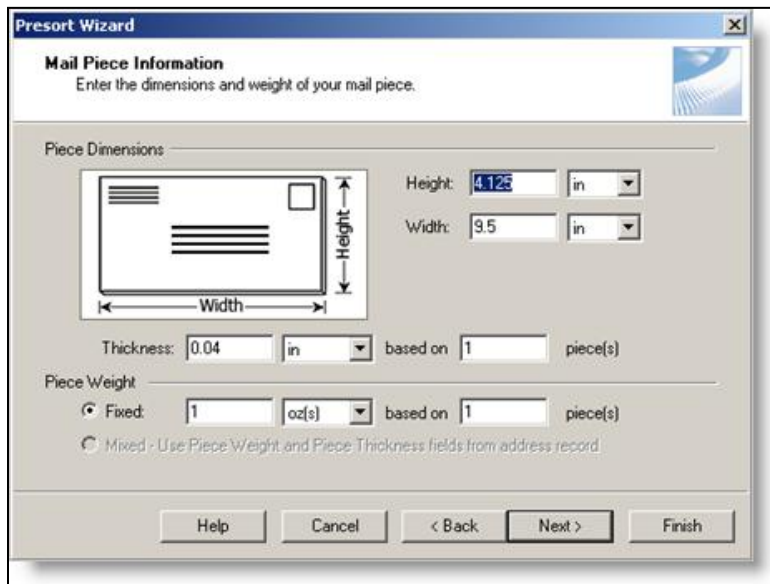
	Minimum	Maximum
Width	5 in	11-1/2 in
Height	3-1/2 in	6-1/8 in
Thickness	0.007 in	1/4 in
Weight	none	3.5 oz

Help Cancel < Back Next > Finish

22) Select **Mail Piece** information.23) Click **Next**.

24) Enter **Mail Piece** information.

Mail Piece Information



The 'Presort Wizard' dialog box, titled 'Mail Piece Information', prompts the user to 'Enter the dimensions and weight of your mail piece.' It features a diagram of a mail piece with 'Width' and 'Height' labels. The input fields are as follows:

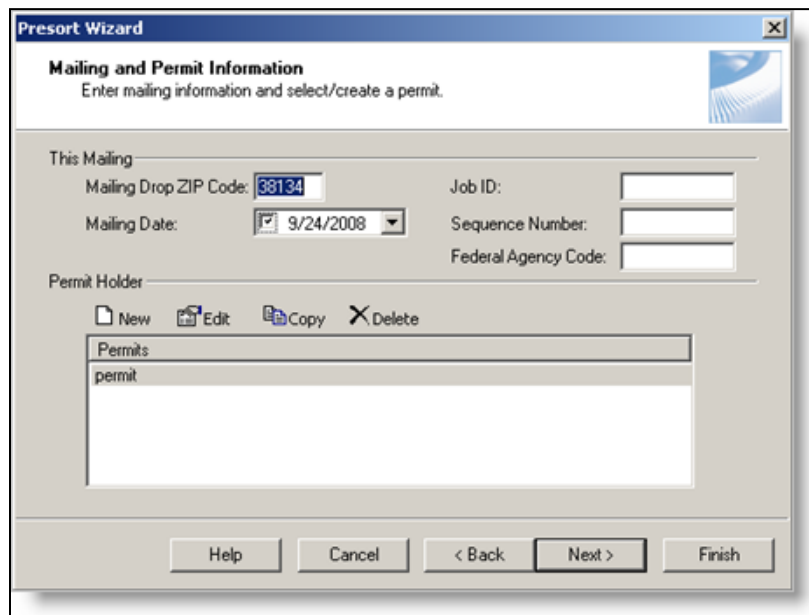
- Height: 4.125 in
- Width: 9.5 in
- Thickness: 0.04 in, based on 1 piece(s)
- Piece Weight: ☒ Fixed: 1 oz(s), based on 1 piece(s); ☐ Mixed: Use Piece Weight and Piece Thickness fields from address record

Buttons at the bottom include Help, Cancel, < Back, Next >, and Finish.

25) Click **Next**.

26) Select **Mailing and Permit** information.

Mailing and Permit Information



The 'Presort Wizard' dialog box, titled 'Mailing and Permit Information', prompts the user to 'Enter mailing information and select/create a permit.' It contains the following fields and controls:

- This Mailing:**
 - Mailing Drop ZIP Code: 98134
 - Mailing Date: ☒ 9/24/2008
 - Job ID: [empty field]
 - Sequence Number: [empty field]
 - Federal Agency Code: [empty field]
- Permit Holder:**
 - Buttons: New, Edit, Copy, Delete
 - Permits list: permit

Buttons at the bottom include Help, Cancel, < Back, Next >, and Finish.

27) Click **Next**.

28) Select sorting preparation.

Sorting Preparation

The screenshot shows the 'Presort Wizard' dialog box with the 'Sorting Preparation' tab selected. The title bar reads 'Presort Wizard'. The main heading is 'Sorting Preparation' with the instruction 'Select sort levels and define sorting options.' Below this, the 'Sort Levels' section has a 'First sort level:' dropdown menu set to 'Nonautomation'. The 'Advanced Options' section contains three buttons: 'Sorting...', 'Trays...', and 'Pallets...'. To the right of these buttons are two checked options: 'Pieces are barcoded' and '1' and 2' trays; 6" max. bundles'. Below these is the text 'Not using pallets'. At the bottom are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

29) Click **Next**.

30) Select **Mail Sort Discounts**.

Mail Sort Discounts

The screenshot shows the 'Presort Wizard' dialog box with the 'Mail Sort Discounts' tab selected. The title bar reads 'Presort Wizard'. The main heading is 'Mail Sort Discounts' with the instruction 'Select the mail sort discounts for which you qualify.' Below this, the 'Eligibility Discount' section has a checked option 'Nonprofit rate'. The 'Destination Entry Discounts' section has a 'Mail Drop Post Office' section with three options: 'SCF MEMPHIS TN 380' (unchecked), 'BMC MEMPHIS TN 38999' (checked), and 'Area Distribution Center (ADC)' (unchecked). To the right of this section is a 'Destination Delivery Unit (DDU)' section with an unchecked option and a 'ZIP Codes...' button. At the bottom are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

31) Click **Next**.

32) Select tray layout options.

Tray Label Layout

The screenshot shows the 'Presort Wizard' dialog box, specifically the 'Tray Label Layout' step. The title bar reads 'Presort Wizard'. The main heading is 'Tray Label Layout' with the instruction 'Describe your label stock.' Below this, there are sections for 'Printer Type' (with radio buttons for 'Laser or Inkjet' and 'Dot Matrix'), 'Label Layout' (with icons for 'New', 'Edit', 'Copy', and 'Delete'), and 'Mailer Information' (with text boxes for 'Company Name', 'City, State & ZIP Code', and a 'Details...' button). The 'Label Layout' section contains a list box with 'Layouts' and two items: '2x5 Sheet1' and '2x5 Sheet2'. To the right of the list box, the 'Paper' is '8.5" x 11.0"', 'Label Size' is '3.25" x 2.00"', and 'Layout' is '2 x 5'. The 'Mailer Information' section has 'Company Name' as 'Arena', 'City, State & ZIP Code' as 'Cordova TN 38134'. At the bottom are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

Presort Wizard

Tray Label Layout
Describe your label stock.

Printer Type: ☒ Laser or Inkjet ☐ Dot Matrix

Label Layout:

Layouts:
2x5 Sheet1
2x5 Sheet2

Paper: 8.5" x 11.0" [Details...](#)
Label Size: 3.25" x 2.00"
Layout: 2 x 5

Mailer Information:
Company Name:
City, State & ZIP Code:

[Help](#) [Cancel](#) [< Back](#) [Next >](#) [Finish](#)

33) Click **Finish**. Your mailing report displays, as shown below.

Steps to Create Contributions Statements:

- 1) Open the **Mailing** application.
- 2) Select **Contributions**.

Choose Action

The screenshot shows the 'Choose Action' dialog box within the 'Arena Mailing' application window. The title bar reads 'Arena Mailing'. The main heading is 'Choose Action' with the instruction 'Please select an action to take.' Below this, there are two options, each with an icon and a description. The first option, 'Mass Mailing', is represented by a yellow box with an orange arrow and has an unselected radio button. Its description is 'You can optionally combine family members before sorting. No other reports are required.' The second option, 'Contribution Statements', is represented by a magnifying glass over a document and has a selected radio button. Its description is 'Those contributing as a family will be combined automatically before being sorted for mailing.' At the bottom left, there is a link labeled 'Settings...'. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

- 3) Click **Next**.
- 4) Select **Filter options**.

Filter Options

The screenshot shows the 'Filter' dialog box within the 'Arena Mailing' application window. The title bar reads 'Arena Mailing'. The main heading is 'Filter' with the instruction 'Select Filter Options'. Below this, there are several filter options. The 'From' date is set to '12/22/2008' and the 'Through' date is set to '12/22/2009'. The 'Minimum Gift' is set to '0'. There are three checkboxes: 'Minimum Gift Based on Dates' (unchecked), 'Include People who Pledged but didn't give' (unchecked), and 'Skip Sorting' (unchecked). At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

- 5) Click **Next**.

- 6) Select **Certify and Sort** options, as desired.

Certify and Sort

The screenshot shows the 'Certify and Sort' dialog box within the 'Arena Mailing' application. The title bar reads 'Arena Mailing'. The dialog has a green header bar with the title 'Certify and Sort' and a subtitle 'Please complete the Wizards and Press Next.' There is a small icon of a folder with a red arrow in the top right corner. The main area contains a text field labeled 'Pre-Sort List Name' with the value '1Q and 2Q Statements'. Below this are two checkboxes: 'Run Move Agent' and 'Cass Certify', both of which are currently unchecked. At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'.

- 7) Click **Next**.
8) Select or create a **Template**, as desired.

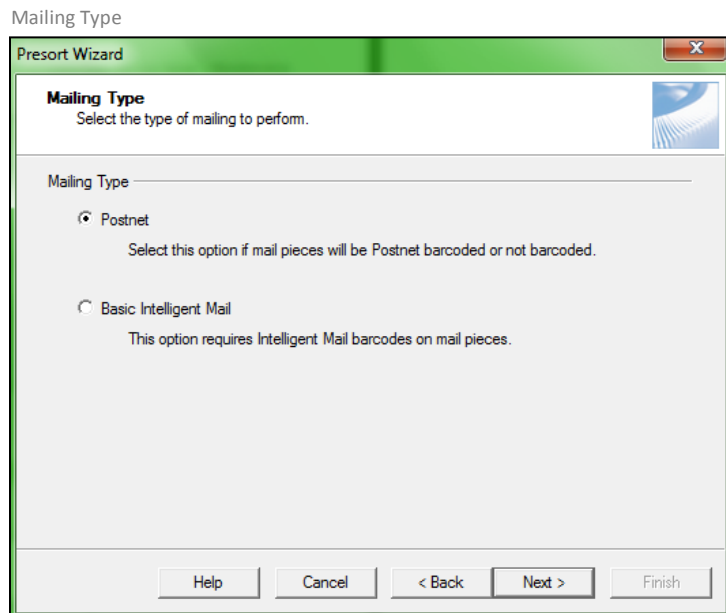
Template

The screenshot shows the 'Sort Templates' dialog box within the 'Presort Wizard' application. The title bar reads 'Presort Wizard'. The dialog has a green header bar with the title 'Sort Templates' and a subtitle 'You can save your settings as a template for future use.' There is a small icon of a document with a blue arrow in the top right corner. The main area is titled 'Template Selection' and contains three radio buttons: 'Do not use template' (which is selected), 'Create new template', and 'Use existing template'. The 'Create new template' option has a text field labeled 'Name:' next to it. Below the radio buttons are two icons: a document with a plus sign labeled 'Copy' and a document with an X labeled 'Delete'. Below these icons is a table with two columns: 'Name' and 'Last Modified'. The table contains one row with the values 'Avery 5160' and '12/22/09'. At the bottom of the dialog are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

Name	Last Modified
Avery 5160	12/22/09

- 9) Click **Next**.

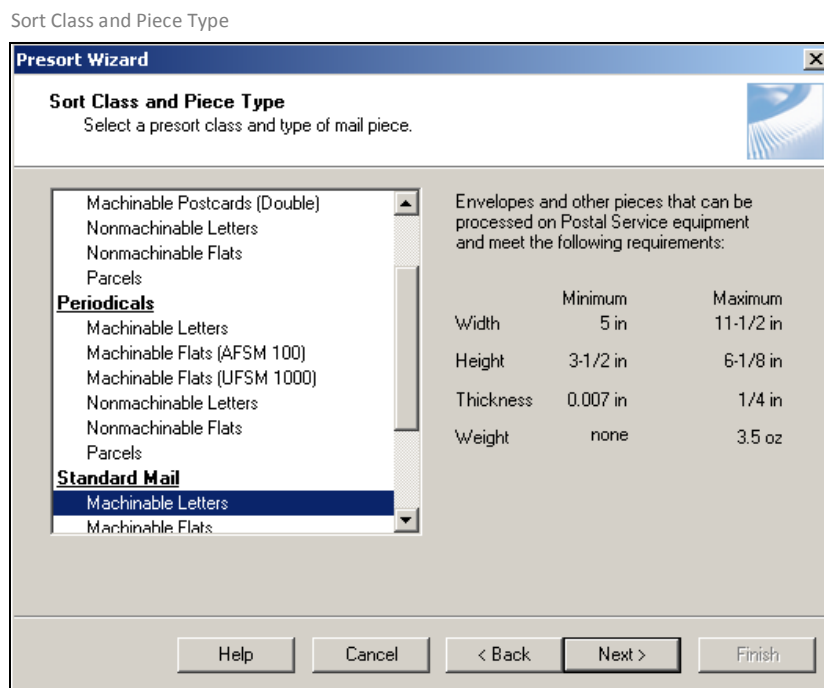
10) Select **Mailing Type**.



- **Postnet** – This option is for mailings not using barcodes.
- **Basic Intelligent Mail** – This option is for mailings requiring barcodes on all mail pieces.

11) Click **Next**.

12) Select **sort class** and **piece type**.



13) Click **Next**.

14) Select **Mail Piece** information.

Mail Piece Information

The screenshot shows the 'Presort Wizard' dialog box with the 'Mail Piece Information' tab selected. The title bar reads 'Presort Wizard'. The main heading is 'Mail Piece Information' with the instruction 'Enter the dimensions and weight of your mail piece.' Below this, there is a diagram of a mail piece with 'Width' and 'Height' labels. To the right of the diagram are input fields for 'Height: 4.125 in' and 'Width: 9.5 in'. Below the diagram are fields for 'Thickness: 0.04 in' and 'based on 1 piece(s)'. Under the 'Piece Weight' section, the 'Fixed' radio button is selected, with a value of '1 oz(s)' and 'based on 1 piece(s)'. There is also an unchecked 'Mixed' radio button with the text 'Use Piece Weight and Piece Thickness fields from address record'. At the bottom are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

15) Click **Next**.

16) Select **Mailing and Permit** information.

Mailing and Permit Information

The screenshot shows the 'Presort Wizard' dialog box with the 'Mailing and Permit Information' tab selected. The title bar reads 'Presort Wizard'. The main heading is 'Mailing and Permit Information' with the instruction 'Enter mailing information and select/create a permit.' Below this, there are fields for 'This Mailing': 'Mailing Drop ZIP Code: 98134', 'Job ID:', 'Mailing Date: 9/24/2008', 'Sequence Number:', and 'Federal Agency Code:'. Under the 'Permit Holder' section, there are icons for 'New', 'Edit', 'Copy', and 'Delete'. Below these icons is a list box labeled 'Permits' containing the entry 'permit'. At the bottom are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

17) Click **Next**.

18) Select **sorting option**.

Sorting Preparation

The screenshot shows the 'Presort Wizard' window with the 'Sorting Preparation' tab selected. The title bar reads 'Presort Wizard'. Below the title bar, the tab is labeled 'Sorting Preparation' with the instruction 'Select sort levels and define sorting options.' The 'Sort Levels' section contains a 'First sort level:' dropdown menu set to 'Nonautomation'. The 'Advanced Options' section includes three buttons: 'Sorting...', 'Trays...', and 'Pallets...'. To the right of these buttons are two checked options: 'Pieces are barcoded' and '1' and 2' trays; 6" max. bundles'. Below these is the text 'Not using pallets'. At the bottom are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

19) Click **Next**.

20) Select **Mail Sort Discounts**.

Mail Sort Discounts

The screenshot shows the 'Presort Wizard' window with the 'Mail Sort Discounts' tab selected. The title bar reads 'Presort Wizard'. Below the title bar, the tab is labeled 'Mail Sort Discounts' with the instruction 'Select the mail sort discounts for which you qualify.' The 'Eligibility Discount' section has a checked option 'Nonprofit rate'. The 'Destination Entry Discounts' section includes a 'Mail Drop Post Office' list with three options: 'SCF MEMPHIS TN 380' (unchecked), 'BMC MEMPHIS TN 38999' (checked), and 'Area Distribution Center (ADC)' (unchecked). To the right of this list is a 'Destination Delivery Unit (DDU)' section with an unchecked checkbox and a 'ZIP Codes...' button. At the bottom are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

21) Click **Next**.

22) Select tray layout options.

Tray Label Layout

The screenshot shows the 'Presort Wizard' dialog box with the 'Tray Label Layout' tab selected. The title bar says 'Presort Wizard'. Below the title bar, it says 'Tray Label Layout' and 'Describe your label stock.' There are three sections: 'Printer Type' with radio buttons for 'Laser or Inkjet' (selected) and 'Dot Matrix'; 'Label Layout' with a list box containing '2x5 Sheet1' and '2x5 Sheet2', and buttons for 'New', 'Edit', 'Copy', and 'Delete'; and 'Mailer Information' with text boxes for 'Company Name' (Arena), 'City, State & ZIP Code' (Cordova, TN, 38134). On the right, it shows 'Paper: 8.5" x 11.0"', 'Label Size: 3.25" x 2.00"', and 'Layout: 2 x 5'. At the bottom are buttons for 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

23) Click **Finish**. Your mailing report displays, as shown below.

Contribution Statements

The screenshot shows the 'Arena Mailing' window with the 'Contribution Statements' report. The title bar says 'Arena Mailing'. The report title is 'Contribution Statements' with the subtitle 'Print or Save the Contribution Statement Reports.' Below the title bar, there are dropdowns for 'First Fund' (2008 Guatemala Mission Trip) and 'Second Fund' (Budget Giving 2008), and a 'View Report' button. The report content includes: 'Your Church Name' (51 Germantown Ct, Suite 300, Cordova, TN 38018-7239), 'Contribution Summary for Walter & Elsie Berryhill' (September 25, 2007 - September 25, 2008), and 'Summary by Fund:'. Under 'Summary by Fund:', it lists '2008 Guatemala Mission Trip' with a table of financial data: Total Pledged (\$1,400.00), Total Cash This Period (\$300.00), Total from Previous Periods (\$0.00), and Pledge Balance (\$1,100.00). To the right of the table is a line graph titled '(Graph displays cumulative totals to date)' showing the cumulative total over time from September to August. At the bottom are buttons for '< Back', 'Next >', and 'Cancel'.

Summary by Fund:	
2008 Guatemala Mission Trip	
Total Pledged	\$1,400.00
Total Cash This Period:	\$300.00
Total from Previous Periods	\$0.00
Pledge Balance	\$1,100.00



Groups

The Groups section allows you to track, maintain members, and run group related reports. Small Groups generally represent a classroom structure; however, Groups are flexible enough to accommodate nearly anything that uses an organized structure of people such as a group that meets in a gym or in a person's home.

Group Trees

Categories

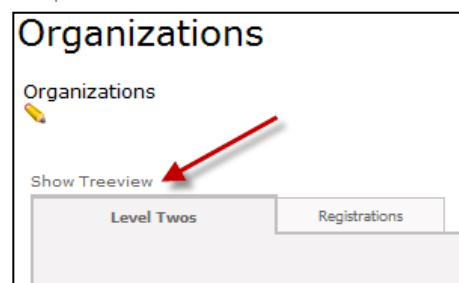
Categories separate all the various types of Groups, such as Small Groups, Sport Groups, and Community Groups. This is not to be confused with Group Types, which are specific per Group, but is a larger idea encompassing overall categorization of the Groups setup. Categories divide Groups by having unique Group Structure Trees, Group Roles, and field captions for Group Details, as covered later. Generally, a different tab on the Arena Navigation Bar represents each Category.

Group Trees

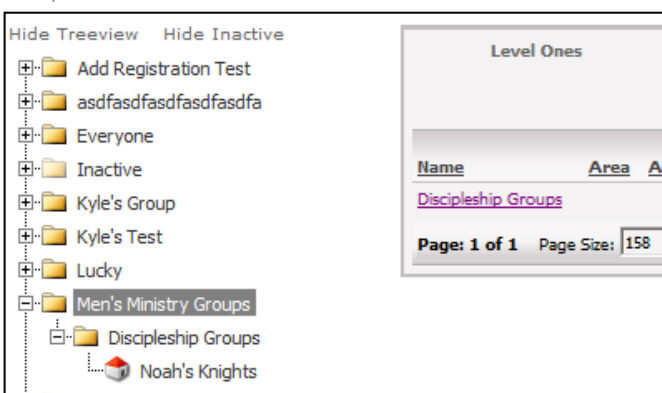
Group Trees represent the different levels and structures for how Groups are organized. When you select the Group Trees, a list will be on the page displaying the top levels of all Group Trees for the Category set for this page, as shown below. The list will also show the Active Status, Leader name, Leader E-mail, total number of Small Groups in that Tree, the total number of Members in those Small Groups, the number of Unassigned Registrants, the number of Pending Registrants, and Notes. There is also a Registrations tab, where you can view and assign Group Registrants.

Click **Show Treeview** to view all Groups in a Tree view, clicking the + to expand the tree.

Groups



Group Tree view



Group Trees

Show Treeview

Level Twos Registrations

☒ Active Only

Name	Area	Active	Leader	Email	Small Groups	Members	Unassigned Registrations	Pending Registrations	Notes
Add Registration Test	Memphis		Stewie AdministratorR	caleb.mail@gmail.com	1	5	3	1	Level Two Notes
Kyle's Group	Memphis				6	8	0	2	
Test Group for Bulk Update					2	0	0	0	
Testing Org					4	12	0	2	
The Kyle Organization	Memphis				3	12	0	9	

Page: 1 of 1 Page Size: 58 [Refresh](#)

Group Trees are where Parent-Child relationships define levels. Clicking on a level [link](#) will display a new list, showing child levels or groups of that level (depending on how many levels are in the Group Tree). As you select each level, the page will show the details for that level: the level Name, Active Status, Leader, Administrator, URL, the Parent Level name, and Type. It will show the same list as the top level for its child levels.

Throughout the Group Tree structure, you have the ability send to e-mails to Leaders, Administrative Assistants, Group Members, etc.

Group Category E-mails

Home > Groups > All Groups > Children's Ministry

Children Name Children's Ministry

Active Yes

Leader

Admin

URL

Parent

Type Children's Ministry

☐ Send To All 1 Department Leaders
☐ Send To All 5 Grade/Age Leaders
☐ Send To All 5 Groups Leaders
☐ Send To All 177 Groups Members
☐ Send To All 5 Groups Leaders
[Create Communications...](#)

Children Description

This is a new Group Collection.

[Edit Details](#)



Leaders and Administrators assigned to a Level are considered to be Administrators for all child Levels and Groups beneath their assigned Level.

There are three additional tabs:

Group Category Tabs

Groups	Security	Registrations	Attendance Summary
--------	----------	---------------	--------------------

- **Security** – This page allows you the ability set security, by Security Role or by person.
- **Registrations** – This page displays unassigned and assigned Registrants.
- **Attendance Summary** – This page shows a quick summary of Attendance for the Small Groups that are in this Group Tree below the current level. It allows the user to see which Occurrences a person attended.

SUBSCRIBING TO A GROUP

You can navigate down through the Tree until you get to the Small Groups, as shown below. At this level, you can subscribe to any Group. Click on the checkbox next to the Group for which you would like to subscribe.

Subscribing to a Group

Groups			Security	Registrations	Attendance Summary				
Subscribe	Groups	Active	Meeting in Area	Leader E-Mail	Age	Avg. Age	Test Type	Meeting Day	Ma
<input type="checkbox"/>	Men (Ages 20-29)					27	Adult Ministry	Unknown	
<input type="checkbox"/>	Men (Ages 30-39)					38	Adult Ministry	Unknown	
<input type="checkbox"/>	Men (Ages 40-49)					48	Adult Ministry	Unknown	
<input checked="" type="checkbox"/>	Men (Ages 50-59)					55	Adult Ministry	Unknown	
<input type="checkbox"/>	Men (Ages 60-69)					65	Adult Ministry	Unknown	
<input type="checkbox"/>	Widows					84	Adult Ministry	Unknown	

Subscribing to a Group causes a hyperlink to be available on the right-navigation bar of Arena's home page. A subscribed link allows you to see the number of Members and the number of Pending Registrants for the Group. Click the [hyperlink](#) on Arena's home page to display the details for the group.

Group Subscription Link on Home Page

Subscribed Groups
Men (Ages 50-59)(38; 0)
PEP Moms(15; 0)
Tigers(6; 0)
Virtual Couples Small Group(8; 0)
WIC(9; 1)

There is no subscription limit.

There are six tabs on the Small Group page, as shown below. Using the available tabs you can e-mail members of the groups, view and process registrants, take attendance, view and print a roster, and upload documents.

Leader	Jane Sample	Type	Unknown	Co-Group Leader	
Active	Yes	Topic	Unknown	Sample Dropdown	option A option B option C
Group Name	Small Group	Meeting Day	Monday	test1	
Parent	Level 1 (Memphis)	Meeting Start Time	9:00 AM	test2	
Group URL		Meeting End Time	10:30 AM		
Location	Arena 2011.1.100 Sprint 1	Age Range	40's		
		Marital Preference	Any		

Description

This is the 2nd group.

Schedule

Schedule

Notes


Notes

Date Modified 12/27/2010 9:23 AM


Show Treeview

Small Group Members	Registrations	Occurrences	Attendance Summary	Roster	Documents
---------------------	---------------	-------------	--------------------	--------	-----------

Add

	First Name	<input type="text"/>	Member Roles	<input checked="" type="checkbox"/> Male
	Last Name	<input type="text"/>		<input checked="" type="checkbox"/> Female
	<input type="button" value="Apply Filter"/>			<input checked="" type="checkbox"/> Unknown
				<input type="checkbox"/> Active Only

Name	Home Phone	Date Added	Area	Address	City	State	Zip	Proximity	Email	Role	Active	Date Inactive
Jane Sample	(901) 757-2372	7/19/2007		7345 Goodlett Farms Pkwy	Cordova	TN	38016-4990		linda.johnson@arenachms.com	Leader	✓	
Josh Flippen		12/15/2010							josh.flippen@arenachms.com	Assistant Leader	✓	
Dave Barker	(901) 555-8888	9/10/2007		5164 Wesley Park Dr	Memphis	TN	38135-2270		kyle.barker@arenachms.com	Member		12/28/2010

- **Members** – The list of Group Members will show the member’s name, home phone number, date added to the group, address, proximity (between them and the Location or Leader), E-mail address, Group Role, and Active Status. *By selecting the  icon, you can change the Role of a group member, and change the active/inactive status. When you make a member inactive, the current date is applied. When the member is made active, the date is removed. See your Arena Administrator regarding Group Role options.*
- **Registrations** – This tab displays Pending Registrants. You can mark them as accepted or denied as Group Members, providing your Security role permits.
- **Occurrences** – This tab allows you to create and view occurrences for this group for attendance tracking.
- **Attendance Summary** – This tab will show a quick summary of Attendance for this Group. It allows the user to see which Occurrences a person attended.
- **Roster** – This tab shows a directory style Roster of the Group Members.
- **Documents** – This tab allows you the ability to upload documents pertinent to this group.

On the Small Group Members page, you can select the edit icon to change the Role of any member or make them inactive in the group. Arena will date stamp when you add someone to the group and when you make someone inactive.

Group Members

Groups Members

Registrations

Occurrences

Attendance Summary

Roster

Documents

Add

First Name

Last Name






Apply Filter

Member Roles

☒ Member
☒ Host
☒ Lay Leader
☒ Male

☒ Leader
☒ Prospective Host
☒ Group Leader
☒ Female


☒ Assistant Leader
☒ Prospective Leader
☐ Unknown
☐ ActiveOnly

	Name	Home Phone	Date Added	Area	Address	City	State	Zip	Proximity	Email	Birth Date	Age	Role	Active	Date Inactive	
<input type="checkbox"/>	Lola Anthony	(901) 372-2026	3/25/2009		7920 Ashbrook Cv. Dba Fishing Buddy	Cordova	TN	38018			10/11/1920	90	Member		3/6/2011	 
<input type="checkbox"/>	Lucille Burke	(901) 366-2153	3/25/2009		94 Saint Albans Fwy	Memphis	TN	38111-7712			7/2/1941	69	<div>Member</div> <div>Member</div> <div>Leader</div>	<input checked="" type="checkbox"/>		  

CREATING A NEW GROUP TREE:

Creating a new Group Tree depends on Group Categories, Cluster Types, and Cluster Levels already set up by your Administrator. Once created, the process of creating Group Trees begins from the top of the Group Trees page.

Steps to Add a New Group Tree:

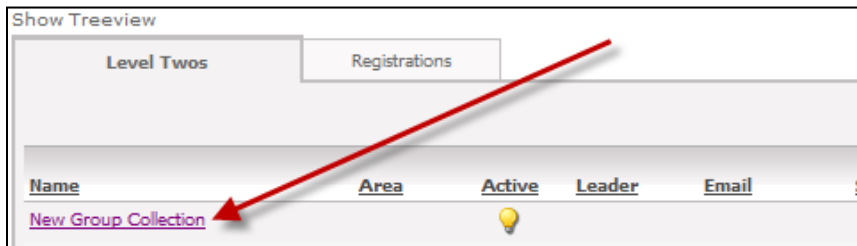
- 1) Click the Add link to create the first Group Tree. If there are any existing Trees, click the Add New (Type)  icon. If there is no link or icon, but only a Registrations tab, there are no Cluster Types set up.

New Group



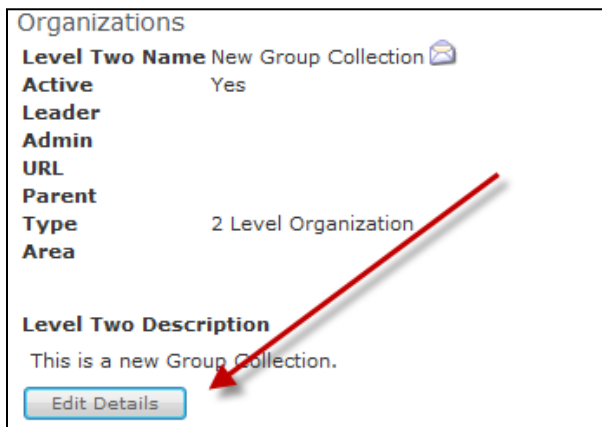
- 2) Click the [New Group Collection](#).

New Group Collection



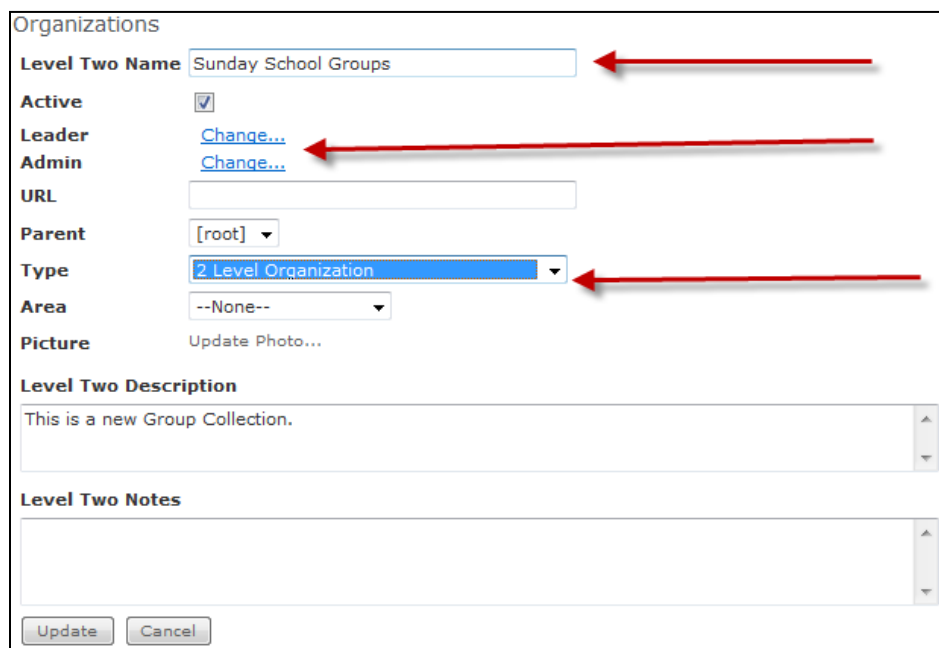
- 3) Click the Edit Details button on the next page to display the detail area of the [New \(Group Collection\)](#).

Edit Group Details



- 4) Enter the Type **Name**, set the **Leader** and **Administrator**, and enter in the website **URL** for this level. Based on the default setting, there will be a **Type** list. If needed, change this Type. The Type determines how many levels this group will have before you can create classes. If you are familiar with Shelby Systems software, you will already know about Levels in relation to Organizations. Also, enter in a description and any notes you wish to place on the Group. Only the **Name** and **Type** are required.

Group Details



The screenshot shows the 'Group Details' form. Red arrows point to the following fields:

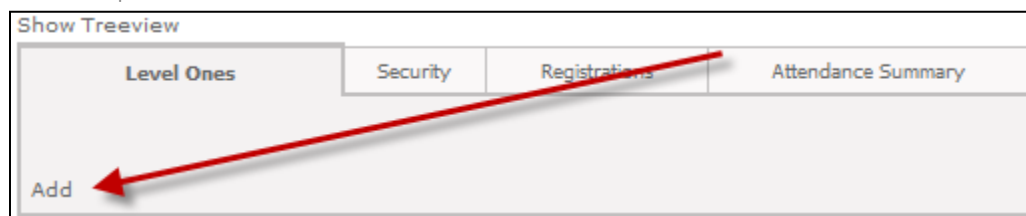
- Level Two Name:** A text input field containing 'Sunday School Groups'.
- Leader:** A link labeled 'Change...'.
- Admin:** A link labeled 'Change...'.
- Type:** A dropdown menu currently showing '2 Level Organization'.

Other visible fields include:

- Active:** A checked checkbox.
- URL:** An empty text input field.
- Parent:** A dropdown menu showing '[root]'.
- Area:** A dropdown menu showing '--None--'.
- Picture:** A link labeled 'Update Photo...'.
- Level Two Description:** A text area containing 'This is a new Group Collection.'
- Level Two Notes:** An empty text area.
- Buttons:** 'Update' and 'Cancel' buttons at the bottom.

- 5) Click the Update button when done.
- 6) Click **Add** to add a second level to this group. *The Type in the previous step determined the numbers of levels for the group tree.*

Second Group Level



The screenshot shows the 'Second Group Level' interface. A red arrow points to the 'Add' button in the bottom left corner. The interface includes a 'Show Treeview' header and a tabbed interface with tabs for 'Level Ones', 'Security', 'Registrations', and 'Attendance Summary'.

- 7) Click [New Collection](#).

Second Group Level

Show Treeview					
Level Ones		Security	Registrations	Attendance Summary	
Name	Area	Active	Leader	Email	Small G
New Group Collection					0

- 8) Click **Edit Details** and complete the information for this second Group level.
 9) Click **Update**.
 10) Click the [Group](#) link.

New Group Link

Show Treeview					
Small Groups		Security	Registrations	Attendance Summary	
Subscribe	Small Groups	Active	Leader E-Mail	Avg. Age	Meeting Day
	[GroupID: 45]				Unknown
Page: 1 of 1 Page Size: 1 Refresh 1 Small Group(s)					

- 11) Click **Edit Details**.

Small Group Details

Small Group Members			
Leader		Type	Unknown
Active	Yes	Topic	Unknown
Group Name		Meeting Day	Unknown
Parent	New Group Collection	Meeting Start Time	
Group URL		Meeting End Time	
Location	Arena	Age Range	Any
		Marital Preference	Any
<div> <input type="button" value="Edit Details"/> <input type="button" value="Print Roster"/> </div>			
Date Modified 6/11/2010 10:43 AM			

12) Complete the **details** for this specific group.

Group Overview

Small Group Members

Overview Custom Fields

Leader	June Cleaver Change... Remove	Test Type	Women's Ministry ▼
Active	<input checked="" type="checkbox"/>	Topic	3rd Week of the Montl ▼
Group Name	PEP Moms	Meeting Day	Tuesday ▼
Parent	--Monthly Groups ▼	Meeting Start Time	
Group URL		Meeting End Time	
Location	Passage Community Church ▼	Age Range	Any ▼
<input type="checkbox"/> Is this group private?		Marital Preference	Any ▼
		Maximum Members	20
		Twitter Login	
		Twitter Password (optional)	
		Flickr Username	
		Group Picture	
		Update Photo...	

Description

PEP Moms is a support group for mothers of all ages ▼

Schedule

This group meets in the Fellowship Hall. Registration begins ▼

Notes

Custom Fields

Meeting Location ☐ Main Campus ☐ Off Campus ☐ Other

- **Leader** – This is the person who is the leader for this group.
- **Active** – Check this box if the group is active.
- **Group Name** – Enter a name for this group.
- **Parent** – This is the parent group in this group tree.
- **Group URL** – This is the URL for this specific group, if applicable.
- **Location** – This is where the group meets.
- **Is this group private** – Check this box if you wish to not make this group available on your Arena-managed website.
- **Description** – Enter a description, as desired, for this group that will provide website users a description for this group.
- **Schedule** – Enter schedule information for this group.
- **Notes** – Enter additional notes, as desired.
- **Type** – Select the type for this group.
- **Topic** – Select the topic for this group.
- **Meeting Day, Start and End Time** – Select and enter when this group meets.

- **Age Range** – Select the age range for this group.
- **Marital Preference** – Select the marital preference for this group.
- **Maximum Members** – Enter the maximum number of members for this group. This number will limit the number of people in this group with a Member status. Once this group has the entered maximum, it will no longer be available on your Arena-managed website for registrants. The default is 20. You can always manually add members directly to a group from the members tab for this group, exceeding the maximum member value.
- **Twitter Login and Password** – Enter the Twitter account information for this group, if applicable.
- **Flickr Username** – Enter the Flickr user name for this group, if applicable.
- **Group Picture** – Upload a group picture, if desired.
- **Custom Fields** – If you create Group Custom Fields, they will display on the Group Overview page.
- **Date Modified** – Arena will time and date stamp when changes are made to the Group Overview or Custom Fields.

13) Complete **Group Custom Fields**, as desired. *Fields added to a Group are applicable to the details of the Group.*

Group Custom Fields

Small Group Members

Overview Custom Fields

Custom Fields
Custom Fields are fields that you can add to your group so that information specific to your group can be entered.

Label	Visible	Required	Location	Type	Type Qualifier	
Co-Group Leader	✓		Left	Person	7	

Custom Field Modules
Field Modules are pre-configured groupings of Custom Fields that can be added to your group. If you have a group of fields that you consistently use, these fields can be set up as a Field Module so that you can easily add them here. The Arena Administrator(s) can set these field modules up for you.

Category	Module	Attributes	Remove
Apparel	Sample of Custom Fields	Sample Dropdown (Arena.Portal.UI.FieldTypes.DropDownField)	
Miscellaneous	More Sample Custom Fields	test1 (Arena.Portal.UI.FieldTypes.AddressField) test2 (Arena.Portal.UI.FieldTypes.CheckBoxField)	

Add New Field Module: DW Clothes

Date Modified 12/27/2010 9:10 AM

Field Types:


- **Address** – places Street, City, State, and Zip fields on the form.
- **Area** – places a list of existing areas on the form in a drop down list format.
- **Checkbox** – places a checkbox for each value added in the Value field. Enter the values separated by commas. *You can select any or all of the available options.*
- **Custom Query** – allows a custom query.
- **Date** – places a date field with a calendar button.
- **Document** – allows a document to be attached.
- **Dropdown List** – places a drop-down list populated with each value added in the Value field.
- **Image** – this allows users to upload an image.
- **Lookup Type** – allow you to select from a list of Lookup fields.

- **Person** – allows you to select an existing record.
- **Phone Number** – allows you to enter a telephone number.
- **Radio List** – places a radio button for each value added in the Value field. *Only one radio button can be selected at a time.*
- **Rich Text Field** – allows users to enter rich text.
- **Static HTML Content** – allows user to enter HTML content.
- **Static HTML Content** – any text placed in the Value field is included as static text.
- **Textbox** – places a text box on the form. The text box will allow 255 characters.

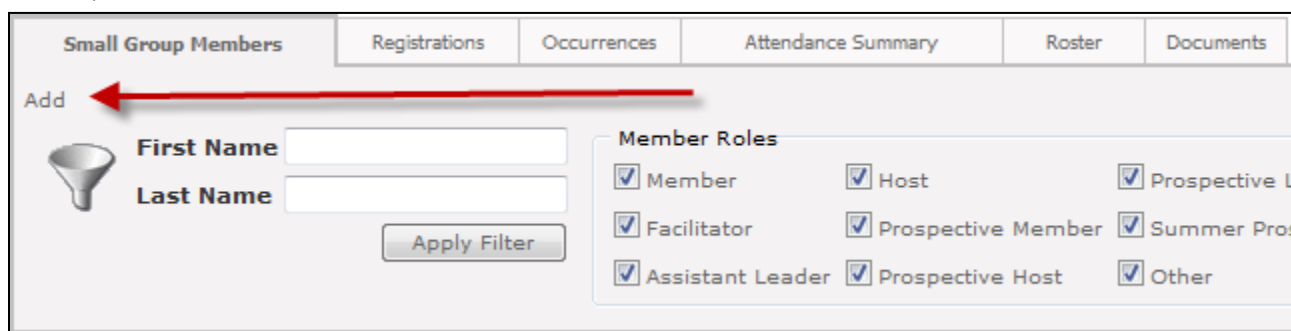
14) Click Update to save.

Add Group Members

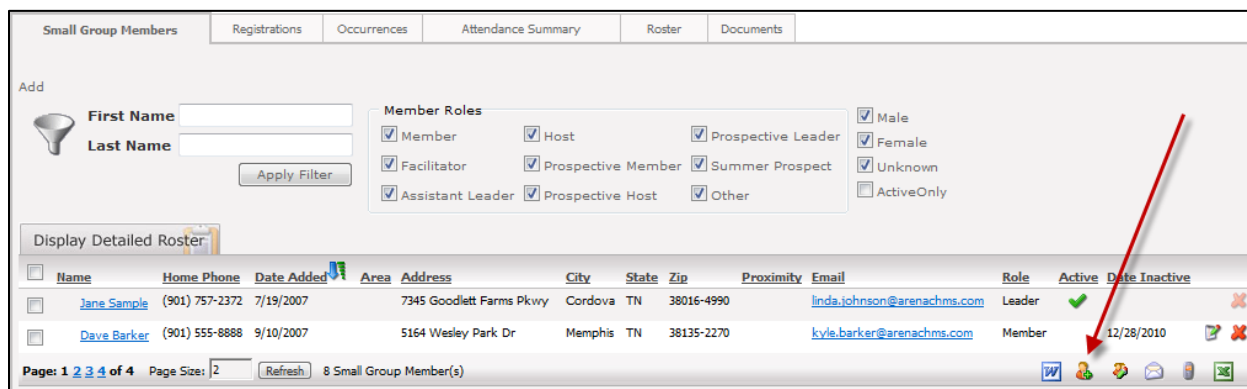
There are two ways to add Group Members, one is through the Add Registrations link under Groups, and the other method is to add them directly to the Group.

To add a member directly, navigate to the Small Group level and click on the Add link above the name filter area or click the Add New Small Group Member icon  at the bottom. This will open up the Pop-up Person Search where you can select members to place into the group. If the group has a Leader in the edit details area, he or she will display in the Members section.

First Group Member





Adding Subsequent Members

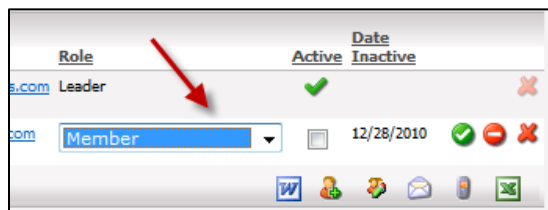


Name	Home Phone	Date Added	Area	Address	City	State	Zip	Proximity	Email	Role	Active	Date Inactive
Jane Sample	(901) 757-2372	7/19/2007		7345 Goodlett Farms Pkwy	Cordova	TN	38016-4990		linda.johnson@arenachms.com	Leader	✓	
Dave Barker	(901) 555-8888	9/10/2007		5164 Wesley Park Dr	Memphis	TN	38135-2270		kyle.barker@arenachms.com	Member		12/28/2010

Steps to Edit a Group Member:

- 1) Click on the Edit  icon on the right to edit the Role, make a member active or inactive.
- 2) Click the save  icon. *When you make a group member inactive, Arena will record the date, as shown below.*

Editing a Group Member



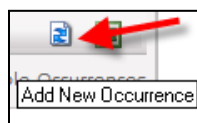
Entering Occurrences

An Occurrence is a record of a meeting date. To view and create new Occurrences, click the Occurrences tab on the Small Group page.

Steps to Create a New Occurrence:

- 1) Click on the Add New Occurrence  icon. This creates a new single Occurrence, called [New Occurrence](#).

Add New Occurrence



- 2) Click on the [New Occurrence](#) to view the occurrence, as shown below.

New Occurrence



- 3) Click **Edit Details** to customize the Occurrence.

Edit Occurrence Details

[New Occurrence]
Allows an attendance occurrence to be modified

Home > Check-In > Attendance Type Categories > Occurrence Detail

Tag: [2008 Back to School Outing](#)
 Attendance Type: [Saturday 5:30pm Service](#)
 Name: [New Occurrence]
 Location:
 Area:
 Start Time: 6/24/2009 12:00 AM
 End Time: 6/24/2009 11:59 PM
 Check-In Location:
 Check-In Start Time:
 Check-In End Time:
 Membership Required for Check-In: No
 Occurrence Closed: No
 Head Count: 0

- 4) Complete the fields for this Occurrence, as desired.

Occurrence Details

Allows an attendance occurrence to be modified

Attendance Type

Name

Location

Area

Start Date **Time:**

End Date **Time:**

Check-In Location

Check-In Start **Time:**

Check-In End **Time:**

Membership Required for Check-In ☐

Occurrence Closed ☐

Head Count

Notes

- **Attendance Type** - This allows you to associate this Occurrence with an existing Attendance Type, created in Check-In.
- **Name** – This is the name of the Occurrence.
- **Location** – This is where the Occurrence takes place.
- **Frequency** - Allows you to select weekly or every other week.
- **Area** - Allows you to associate the Occurrence with an Area, created in Groups.
- **Start/End Dates** - Allows you to enter the dates and time of the Occurrence.
- **Check-In Location** - You can select a Location, created in Check-In.
- **Check-In Start/End** - Allows you to enter the date and time this occurrence should be available, if using Check-In.
- **Membership Required for Check-In** - Check if you wish for only members who are already a part of the Group or Tag associated with the Attendance Type to be able to check in.
- **Occurrence Closed** - Select if you want to close this Occurrence, not allowing anyone to check in.
- **Head Count** - Allows you to enter in a head count for this Occurrence. Head Count overrides any Attendance calculated by the system. Head Count does not affect Check-In Room Ratios.

5) Click **Update** to save and close the window.


6) Click Apply Filter.

The screenshot shows a filter interface with a funnel icon on the left. It contains three input fields: 'First Name', 'Last Name', and 'Status' (a dropdown menu currently set to 'All'). Below these fields is a button labeled 'Apply Filter'. A red arrow points from the top right towards the 'Apply Filter' button.

7) Mark attendance, as desired.

	Address	Check-In	Check-Out	Attended	Notes
Anthony, Lola	7920 Ashbrook Cv, Dba Fishing Buddy Cordova, TN 38018			<input checked="" type="checkbox"/>	<input type="text"/>
Arnault, Linda	1625 Poplar Pike #101 Germantown, TN 38120			<input checked="" type="checkbox"/>	<input type="text"/>
Burke, Lucille	94 Saint Albans Fwy Memphis, TN 38111-7712			<input checked="" type="checkbox"/>	<input type="text"/>
Burris, Linda Carol	1934 Rhineland Dr Memphis, TN 38138-2873			<input checked="" type="checkbox"/>	<input type="text"/>
Currie, Lisa	2880 Carnton Dr Germantown, TN 38138-7370			<input checked="" type="checkbox"/>	<input type="text"/>

Creating Multiple Occurrences

To create a series of identical recurring occurrences, click the Generate Multiple Occurrences  icon.

Multiple Occurrences

Generate Multiple Occurrences

You can use the fields below to generate multiple occurrences. Specify the type, name, location, start time and end time that each occurrence should have. Occurrences will then be created for each Day of Week that you select that falls within the Date Range that you specify.

Attendance Type	Sunday School - 1st Grade	
Name	1st Grade - Boys	
Location	Jones Hall	
Frequency	Weekly	
Day of Week	<input checked="" type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat	
Date Range	1/1/2010	Through 12/31/2010
Occurrence Start Time	08:00 AM	End Time 09:00 AM

The following fields are used by the automated check-in system. In most cases you should leave these fields blank. If you enter information in these fields it will affect the automated check-in system. If you're not sure if you should include information in these fields, please leave them blank.

Check-In Location	Jones Hall - Nursery	
Check-in Start Time	07:45 AM	End Time 09:00 AM
Membership Required for Check-In	<input checked="" type="checkbox"/>	

Generate Occurrences
Cancel

- **Attendance Type** – This is an Attendance Type created in Check-In.
- **Name** – This is the name of the occurrence. *This field is required.*
- **Location** – This is where the occurrence takes place.
- **Frequency** - How often this occurrence meets. Options are weekly and bi-weekly.
- **Day of Week** – The day of the week the occurrence takes place.
- **Date Range** – The period of time for the occurrences.
- **Occurrence Start Time** – The start and end time for the occurrences.
- **Check-In Location** – The Check-In location, if using Check-In for these occurrences.
- **Check-in Start/End Time** – These are the start and end times for the occurrences, if using Check-In.
- **Membership Required for Check-In** – Check this box if you want to allow only Members of this Group or Tag to check-in; not for guests.

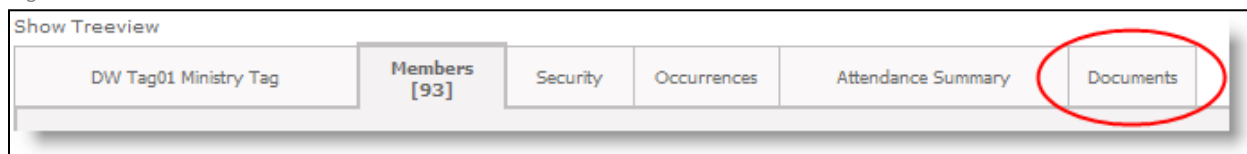
Adding a Document to a Group or Tag:

You can add documents to a small group or tag. In Small Groups, the Documents tab is only available at the Small Group level, as shown below. However, in Tags, the Documents tab is available at all levels in the Tag hierarchy.

Group Documents Tab



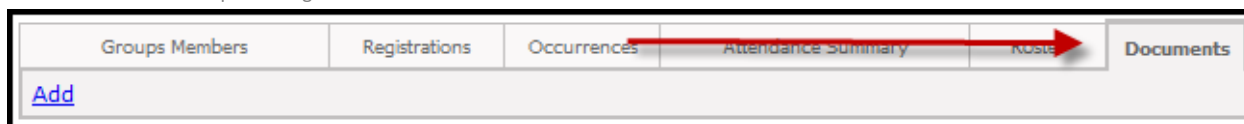
Tag Documents Tab



Steps to Add a Document from a Group or Tag:

- 1) Click the **Documents** tab for a Group or Tag.
- 2) Select the [Add](#) hyperlink to display the Document Selection dialog box.

Documents Tab for Groups and Tags



- 3) Select a **Document Type** from the Type drop-down.
- 4) Enter a **document name** in the Title field.
- 5) Click the **Choose File** link to locate and upload the document.



Document Upload



 A screenshot of a 'Document Upload' dialog box. It has a title bar with a close button. Inside, the text 'Select a Document' is at the top. Below it are two input fields: 'Type' with a dropdown arrow and 'Title' with a text box. Under the 'Title' field is a 'Choose File' button and the text 'No file chosen'. At the bottom are 'Save' and 'Cancel' buttons.

If using an HTML5-compliant browser, you can drag-n-drop the file to the Document Selection dialog box.

- 6) Click **Save**.

Viewing a Document in Groups or Tags

My Test Tag Personal Tag	Members [9]	Occurrences	Attendance Summary	Roster	Documents
<div>Document A (1/16/2010)  </div> <div>description</div> <div>Add</div>					

The Document Type will display as a link if **Use Type as Title** is checked for the chosen Type, otherwise the file name will show as the link. The date the document was attached will show next to the Type. The Title set in the Document Browser will show beneath the link. Click the Edit button  to change the attached document, or the Delete button  to remove the document. Click the [Add](#) link to add more documents.

Add Registration

This feature allows you to register someone for a group in a “best fit” method. You can use the Add Registration feature when you are not certain of the Small Group in which to enroll a person.

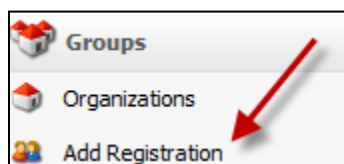
A score value determines the “best fit.” The minimum score and score values are set in Organization Settings under Administration. Based on Group Details, the member provides the criteria for a Group that works for him or her. Putting these values into the Add Registrations page will then determine which Groups most closely match the member’s criteria.

If a Group matches close enough by score, the member is placed as a Pending member for that Group. If no Groups meet the minimum score, the member becomes an unassigned Registrant, and you will have to determine where they should go.

Steps to Add a Person to a Group using Add Registrations:

- 1) Go to Groups → Add Registration.

Add Registration



- 2) Click the [Add...](#) link to search and select for an existing record.
- 3) Select the **group criteria** for this person, including the Type of Group from the drop-down.
- 4) Check **do not automatically assign to a small group**, as desired. This means that he or she will remain as Unassigned, but are in the proper Group Tree as the Group for which he or she would have been pending.

Add Registrations

- 5) Click **Add**.

- 6) Upon completion, Arena will then do one of the following:
- a) If Arena assigns the registrant, the Group Leader will receive an email alerting him or her of the pending registration. The registrant will also receive an email to confirm their registration.
 - b) If the member is Unassigned, an e-mail is sent to the Leader or Administrator of the Cluster Level to notify him or her of the registrant, for the leader to assign the registrant to a Group.



If multiple classes fit the person's criteria, administrators or leaders have the ability to assign the person to any of the classes.



If the Small Group Leader does not have an e-mail address, the Small Group Cluster Leader will receive the e-mail. If the Small Group Leaders and the Small Group Cluster Leaders do not have e-mail addresses, then the e-mail address in the module setting Group Leader E-mail in the Small Group Locator module will get the e-mail request

Processing Registrants

All Unassigned and Pending Registrants will display on the Registration page. You cannot directly add Unassigned Registrants to a Group; they have to be a Pending registrant first.

Pending Group Registrations

Level Twos

Registrations

☐ Show Registrations Already Assigned to a Group

Day of Week
Day of Week 2nd Choice
Marital Preference
Age Preference

Apply Filter

Names	Area	Registration Created	Collection Name	Day of Week	Day of Week (2nd Choice)	Marital Preference	Age Preference
David Sample		6/11/2010	asdfsdfasdfsdfasdfs				
Fred Sample		6/11/2010	asdfsdfasdfsdfasdfs				

Steps to Process Registrations:

- 1) Click on the Registrations tab of the Group Level to view unassigned.

Unassigned Registrant Details

Ministries

Registrations

☐ Show Registrations Already Assigned to a Group

Day of Week
Day of Week 2nd Choice
Marital Preference
Age Preference

Apply Filter

Names	Area	Registration Created	Collection Name	Day of Week	Day of Week (2nd Choice)	Marital Preference	Age Preference
Alicia Maley		9/3/2009	Women's Ministry	Thursday			
Chris Arnault		5/26/2009	Women's Ministry	Sunday		Mixed	30s

- 2) Click on the registrant's [name](#) link in the list to show Registrant Details and the list of all groups within the Tree, as shown below.

Registrant Details

Individual(s)

[Ethel Mertz](#) Age:68 Zip:38111-4222 Notified:False

Assigned to Group Collection Women's Ministry

Assigned to Group

First Day Preference Any

Second Day Preference Any

Topic

Age Preference

Marital Preference

Edit Details

Delete Registration

Group	Match Score	Distance (miles)	Area	Leader Age	Average Age	Meeting Day	Members	Pending	Max Members	Age	Marital Preference	Topic	Notes
Just Moved: Spring 2009	6.9	8.84		36	0	Monday	0	0	20	Any	Any	Weekly	
G.B.A.D.	6.9	8.84		57	0	Tuesday	0	0	20	Any	Any	2nd Week of the Month	
Home School Support	6.9	8.84		59	0	Monday	0	0	20	Any	Any	3rd Week of the Month	
WIC	6.1	8.84		68	48	Tuesday	8	0	20	Any	Any	1st Week of the Month	
Discipleship: Spring 2009	5.6	8.84		49	41	Sunday	11	2	20	Any	Any	Weekly	
Thursday Fellowship	5.5	8.84		39	21	Thursday	14	0	20	Any	Any	Weekly	
Flying Solo: Spring 2009	5.5	8.84		36	47	Wednesday	14	0	20	Any	Divorced/Separated	Weekly	
PEP Moms		8.84		42	43	Tuesday	113	0	20	Any	Any	3rd Week of the Month	
New Mercies: Spring 2009		8.84		71	74	Thursday	53	0	20	Any	Married	Weekly	

Page: 1 of 1
Page Size: 50
Refresh
9 Small Group(s)

- 3) If you are ready to assign the individual to a group, click the radio button to the left of the Group to which you want him or her assigned.
- 4) Select **Assign to Group**. Arena will send emails to both the individual and the group leader.

Assign Group

Group	Match Score	Distance (miles)	Area	Leader Age	Average Age	Meeting Day	Members	Pending	Max Members	Age	Marital Preference	Topic	Notes
<input checked="" type="radio"/> Just Moved: Spring 2009	6.9	8.84		36	0	Monday	0	0	20	Any	Any	Weekly	
<input type="radio"/> G.R.A.D.	6.9	8.84		57	0	Tuesday	0	0	20	Any	Any	2nd Week of the Month	

Page: **1 2 3 4 5** of 5 Page Size: 2 Refresh 9 Small Group(s)

Assign to Group

Note: An email will be sent to both the individuals and to the new small group leader whenever a new small group is assigned.

Steps to Edit the Registration:

- 1) Click **Edit Details** from the registration page.

Group Registration

Individual(s) [Ethel Mertz](#) Age:68 Zip:38111-4222 Notified:False

Assigned to Group Collection Women's Ministry

Assigned to Group

First Day Preference Any

Second Day Preference Any

Topic

Age Preference

Marital Preference

Edit Details **Delete Registration**

Group	Match Score	Distance (miles)	Area	Leader Age	Average Age	Meeting Day	Members
<input checked="" type="radio"/> Just Moved: Spring 2009	6.9	8.84		36	0	Monday	0

- 2) Select the **preferred group or change the selection criteria**.

Registrant Details

Individual(s) [Ethel Mertz](#) [Add...](#) [Clear](#)

Parent Group Women's Ministry

Day of Week

1st Choice: ☒ Any ☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

2nd Choice: ☒ Any ☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Age Range ☐ Any ☐ 20s ☐ 30s ☐ 40s ☐ 50s ☐ 60s ☐ 70+ ☐ Newborn to PreK ☐ Elementary School ☐ Middle School ☐ High School ☐ College

Topic ☐ 1st Week of the Month ☐ 2nd Week of the Month ☐ 3rd Week of the Month ☐ 4th Week of the Month ☐ Weekly

Marital Preference ☐ Any ☐ Married ☐ Mixed ☐ Singles ☐ Single-Parent ☐ Divorced/Separated ☐ Widowed ☐ Not applicable

Notes

Update **Cancel**

- 3) Click **Update**.

Steps to Add a Registration from the Group Page:

- 1) Select the **Registration tab** from the Group page.

Group Registrations

Names	Area	Registration Created	Collection Name	Day of Week	Day of Week (2nd Choice)	Marital Preference	Age Preference
John Tester		6/15/2009	Men's Ministry	Friday		Married	Any

Page: 1 of 1 Page Size: 6 Refresh 1 Registration(s)

- 2) Click the **Confirm Registration** icon to add the person to the group.

Confirm Registration

Names	Area	Registration Created	Collection Name	Day of Week	Day of Week (2nd Choice)	Marital Preference	Age Preference
John Tester		6/15/2009	Men's Ministry	Friday		Married	Any

Page: 1 of 1 Page Size: 6 Refresh 1 Registration(s)

- 3) Click **OK** on the pop-up to **confirm** adding this person to the group as a Member.

Confirm Group Membership

Message from webpage

?

Confirming this registration will result in the individual(s) on this registration being added as members to the current group. This should only be done after the individuals are attending the group, or they have confirmed their intention to attend.




Will these individuals be attending this group?

OK Cancel

Steps to Reassign a Registrant:

- 1) From the Registrations tab, click the [name](#) of the registrant.

Registrant

Names	Area	Registration Created	Collection Name	Day of Week	Day of Week (2nd Choice)	Marital Preference	Age Preference	
John Tester		6/15/2009	Men's Ministry	Friday		Married	Any	  

- 2) Confirm the group and click **Assign to Group**.

Assign to Group

Group	Match Score	Distance (miles)	Area	Leader Age	Average Age	Meeting Day	Members	Pending	Max Members	Age	Marital Preference	Topic
<input type="radio"/> Men of the Covenant: Spring 2009	5.8	0.02		34	32	Tuesday	1	0	20	Any	Any	Weekly
<input checked="" type="radio"/> Discipleship: Spring 2009	5.7	0.02		-1	30	Wednesday	2	1	20	Any	Any	3rd Week of the Month
<input type="radio"/> Becomers: Spring 2009		0.02		34	39	Wednesday	35	0	20	Any	Any	Weekly
<input type="radio"/> Explorers: Spring 2009		0.02		-1	49	Wednesday	66	0	20	Any	Any	Weekly
<input type="radio"/> Rejoicers: Spring 2009		0.02		-1	69	Wednesday	134	0	20	Any	Any	Weekly

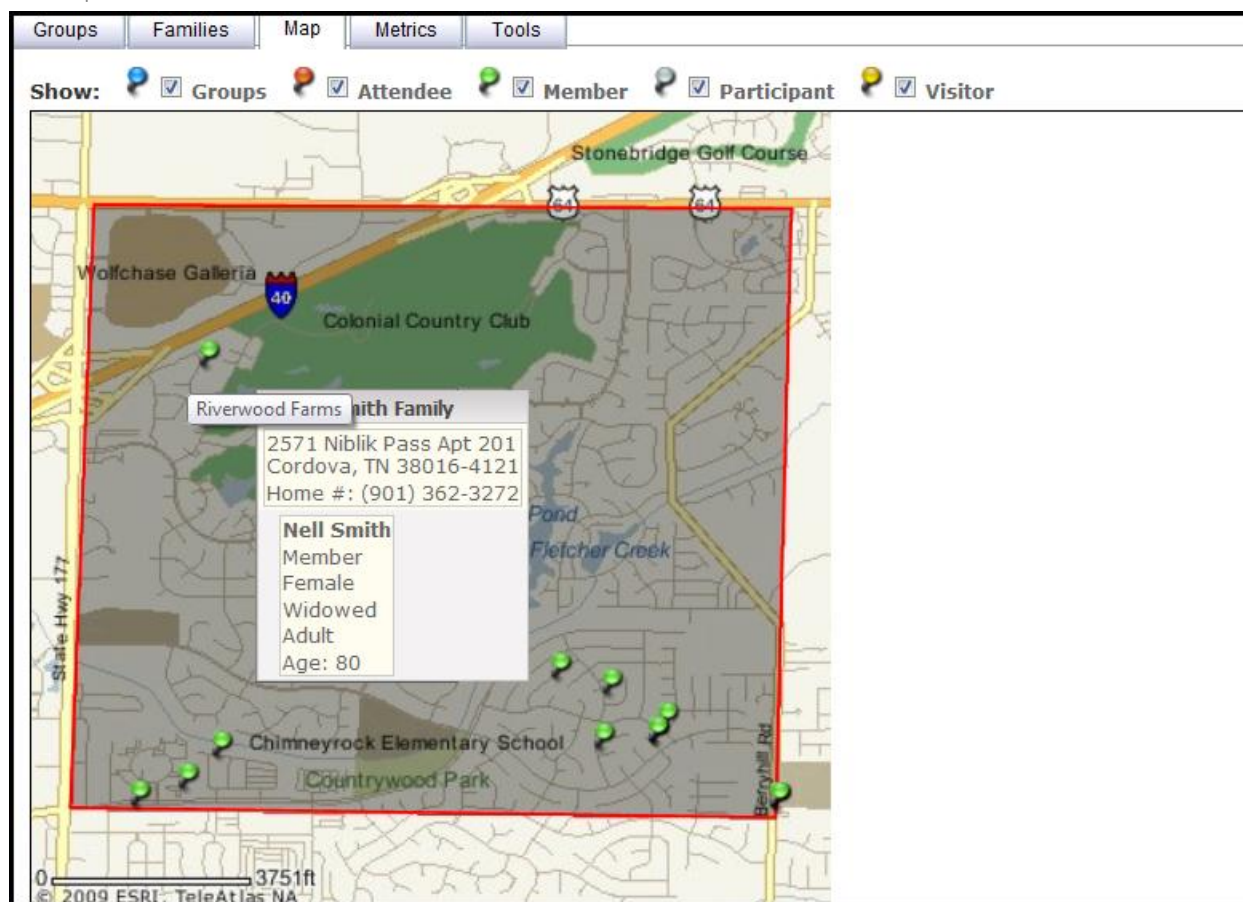
Page: 1 of 1 Page Size: 50 Refresh 5 Small Group(s)

Assign to Group

Areas

The Areas section of Arena is for creating and defining map zones where your small groups meet. An area consists of three or more points creating a geometric shape on the map.


Area Map



You can create points by entering in Latitude and Longitude coordinate values. Any method of finding these values will work, however.

Clicking on Areas under Groups will display an Add link to create the first Area, or if an Area already exists, a Map image encompassing all Areas within will show. For example, if one area is in Texas and the other in California, the initial Areas map will show most of the western United States. Below this map, there will be a list of the already created Areas.

Steps to Add a New Area:

- 1) To add a new Area, click the New Area  icon at the bottom of the Area list.
- 2) Enter the Name, Width and Height (in pixels) of the Area map image, and any notes.

Area Details


Area Details

Area Name

Map Width



Map Height

Area Details

- 3) Click the Add New Leader  icon to add a person to the Leadership Team of this Area, if applicable.
- 4) **Assign** the person an Area Role.

Area Leadership Team

Leadership Team				
Name	Home Phone	Address	Email	Role
Administrator, Stewie	(999) 999-9999	7345 Goodlett Farms Pkwy		Area Leader
<div> <div>Page: 1 of 1</div> <div>Page Size: 163</div> <div>Refresh</div> </div>				

- 5) Click Update  to save.
- 6) Click the **Edit**  icon to change the role.



Even though Area maps can overlap, individual maps must be contiguous and solid. You cannot create an Area that has a hole in it, nor can an Area have several parts scattered around.

- 7) Click the **edit** icon for the coordinate.

New Coordinate

Point 12


0

0

- 8) Enter the latitude and longitude **coordinates** for this map point.

Editing a Coordinate


Point 6

- 9) Click the  **Save** icon.
- 10) **Repeat** steps 3 through 7 for all coordinates for this map.
- 11) Click **Update** once you enter all coordinates.


AREA DETAILS

Once you create a map, opening Area Details shows a small thumbnail of that specific Area, the Area Description, Area member statistics, and a tab bar for Groups, Families, Map, Metrics, and Tools.

Area Details



Description: Memphis is the home of Rock n Roll

Area Leader  [Stewie Administrator](#)

Email This Leadership Team

Baptized: 9.52 %

In A Group: 100.00 %

Serving: 28.57 %

Adults: 21

Children: 7

Households: 16

[Groups](#)
[Families](#)
[Map](#)
[Metrics](#)
[Tools](#)

Area Statistics

- Area statistics are a quick, at-a-glance way to see various totals about the number of people whose addresses fall within this Area.
- **Baptized** – This is the percentage of active adults with a date value for the Baptized Person Attribute.
- **In a Group** – This is the percentage of active adults in the Area enrolled in a Small Group.
- **Serving** – This is the percentage of active adults in a Serving Tag with the status of “Connected”.
- **Adults** – This is the total number of people whose family role is adult, record status is active, and their address places them in this Area.
- **Children** – This is the total number of active children whose address places them in this Area.
- **Households** – This is the total number of Families in this Area.



Area Statistics uses standardized.

Groups Tab







This tab shows a list of all Small Groups that are in a set Category and have a Location that is within this Area. Clicking on a Group name [link](#) will open the Small Group details for that Group.

Groups												
Groups Families Map Metrics Tools												
Small Groups	Meeting in Area	Leader's Email	Age	Avg. Age	Type	Meeting Day	Marital Preference	Topic	Members	Pending Registrations	Avg. Distance	Notes
Take the Reins			28	35	Default Type	Sunday	Any	Unknown	10	0	9.80	Number of people : 1000
The 2nd Group		dan.weinberg@arenachms.com	33	38	Default Type	Monday	Any	Unknown	6	1	270.35	Notes
Bill's Group				35	Default Type	Unknown	Any	Unknown	5	0		
Jump on Board		caleb.mail@gmail.com	30	33	Default Type	Unknown	Any	Unknown	3	9	6.62	
Testing Group		kyle.barker@arenachms.com	39	24	Default Type	Unknown	Any	Unknown	3	0	10.19	

Families Tab

This tab displays a list of all the Families that are in this Area. Clicking on a Family Head name [link](#) will bring up the Person Details page for that person.

Area Families

Groups Families Map Metrics Tools									
Family Head	Status	Gender	Age	Home Phone	Small Group	Class Level	Serving	E-Mail	
Campbell, John	Member	M	54	(901) 777-8899		–	–	jcampbell@arenachms.com	
Cash, John	Member	M	76	(901) 888-7799		–	–	jcash@yahoo.com	
  Doe, Jon	Member	M	22	(901) 555-8888		–		kyle.barker@arenachms.com	

Arena identifies Head of Household as follows:

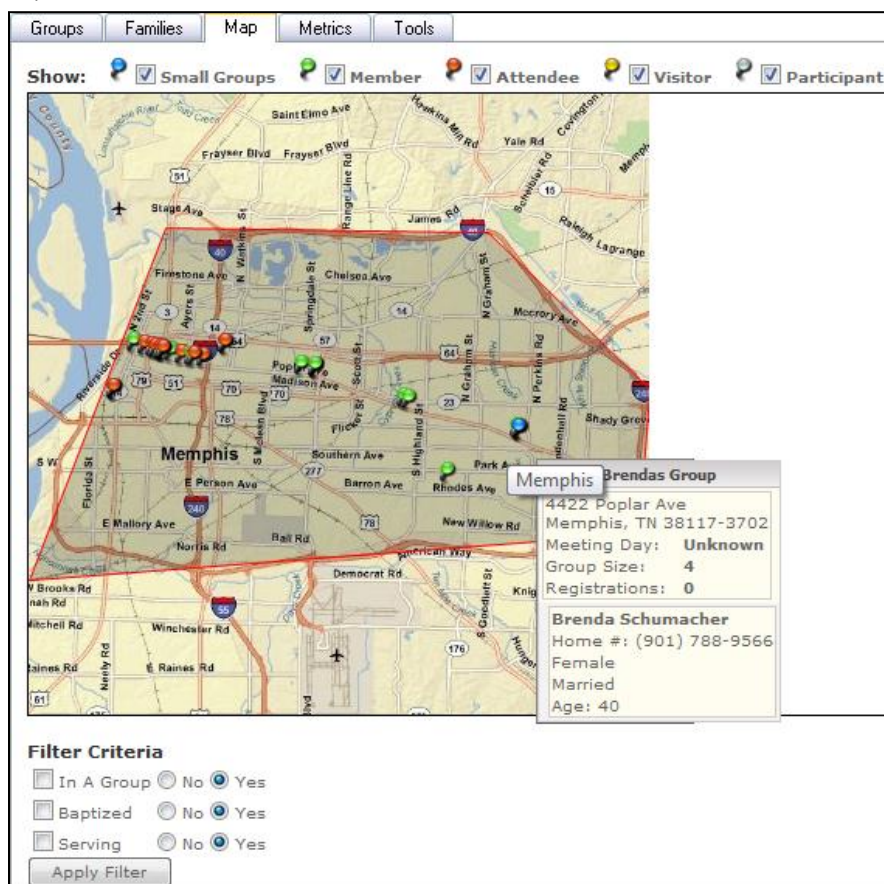


- Family Role (adult over child)
- Gender (male over female)
- Age (eldest)

Map Tab

This tab will display a larger version of the Area Map, and place color-coded Pins for the various Membership Status values. Filter by checking or unchecking a pin value or use any of the Filter Criteria below.

Map



- Click View Larger Map to see a full-page version of the map image.
- Hovering over a pin will display a pop-up with person or group information

Metrics Tab

You can add Metrics to this Area. *See your Arena Administrator for additional information.*

Tools Tab

You can make Reports available on this tab. Reports are created using Microsoft Reporting Services.

Area Tools



Reports

The Reports area for Groups has functionality identical to the Reports section in Membership. The two default reports allow you to print a roster for more than one Group or more than one Tag. You can also use these reports in conjunction with the Attendance Upload module, where by you can upload attendance using a bard code scanner.

Groups Reports



Steps to run a Roster Report:

- 1) Select a **report**.
- 2) Select the **parameters**, as desired.
- 3) Click **View Report**.

Roster Report Parameters

The report will display the Group or Tag, the Leader (if a Group), the Meeting Date, the Meeting Time and each member of that Group or Tag. ***See your Arena Administrator regarding additional reports.***

Tag Roster Report

ID	Name	Phone Numbers
1500	Adams, Ellen 2310 Pacific Ave Manhattan Beach, CA 90266-2632	H: (310) 546-1025 C: 31087459821



Tags

Tags are another way to group records together. **Personal, Ministry, Serving** and **Event Tags** are designed for specific uses, although you may choose to tailor a tag in order to meet the needs of your organization.

Personal Tags are only visible to the current user and allows you to track people such as lunch contacts, personal accountability partners, and relationships specific to you.

Ministry Tags allows you to track people and their relationship to your organization's ministries, such as, Bible study participants, church committees, and other ministry-specific groups.

Serving Tags allows you to track volunteers and prospective volunteers for your organization's ministries. You can also track volunteer qualifications and/or training.

Event Tags allows you track church-wide and ministry-specific events and classes, including on-line registration.



Ministry, Serving and Event Tags are visible only to the user who creates the tag. The Security tab by default for each Tag allows you to set security so other users can view and edit the Tag.


Personal Tags

Personal Tags and Ministry Tags functions the same, with exception of Security settings. *Only the user who creates Personal Tags can access it. Through security settings, other users can access Ministry Tags. Please refer to the Ministry Tag section of this manual for more details.*

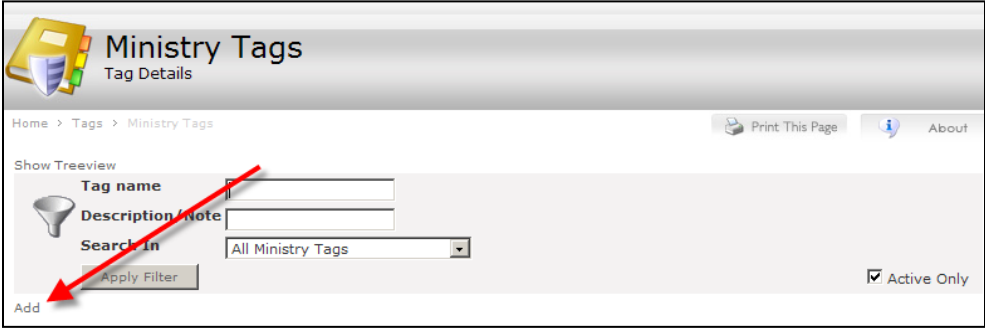
Ministry Tags

You can use Ministry tags internally to track individuals as they relate to your organization's ministries. Examples of ministry tags are Church Committees, Board of Elders, church staff, etc.

Steps to Create a Personal or Ministry Tag:

- 1) Go to Tags → Ministry Tags.
- 2) If you do not have any existing tags, click the Add link as shown below. If you have existing tags, click the Add New Personal Tag  icon in the lower left corner.

Add New Ministry Tag



Ministry Tags
Tag Details

Home > Tags > Ministry Tags

Print This Page About

Show Treeview

Tag name

Description / Note

Search in All Ministry Tags

Apply Filter

Active Only

Add

- 3) In the Overview box, enter a **Name** for this tag.
- 4) Select **Campus**, if you are using Campus.
- 5) Enter **Default Start** and **End Time**, if desired.
- 6) Click the [Change...](#) hyperlink to change from the current user.
- 7) Adjust the **Relationships** scales, as desired.
- 8) Enter **Internal Notes** for this Tag, as desired.

Tag Overview

Tag Details

Overview

Custom Fields

Member Custom Fields

Name

Tag with custom fields

Active ☒

Parent

Personal Tags

Campus

All ▼

Default Start Time

Default End Time

Owner

Linda Johnson [Change...](#)

Relationships

Strength Between Owner & Members

Weak

Moderate

Strong

Strength Between Members

Weak


Moderate

Strong

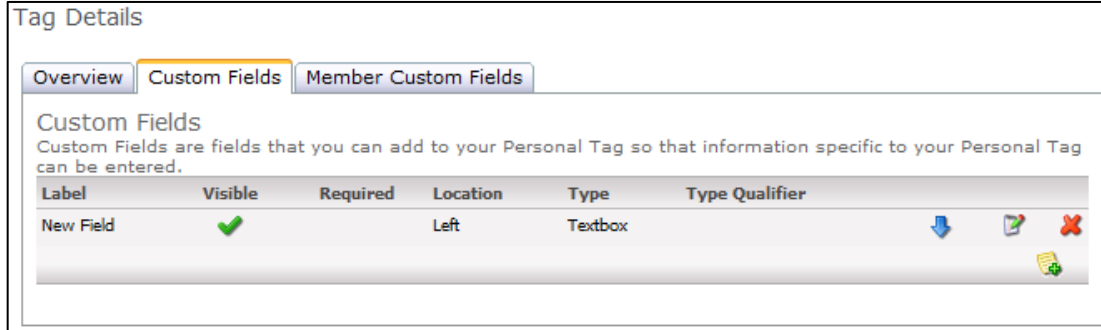
Internal Notes


Update

Cancel

- 9) Select the **Custom Fields** tab to create custom fields. *These Custom Fields will be available for other Tags.*
- 10) For Custom Fields, Click the **Edit**  icon to customize the field.
- 11) Enter or select desired **information** for this custom field name.

Adding a Custom Field



- 12) Click the **Add Custom Field**  icon to add a single field or select one of the options in the **Custom Field Modules** drop-down to add a multiple fields. **See your Arena Administrator regarding Custom Field Modules.**

Field Types:

- **Address** – places Street, City, State, and Zip fields on the form.
- **Area** – places a list of existing areas on the form in a drop down list format.
- **Checkbox** – places a checkbox for each value added in the Value field. Enter the values separated by commas. *You can select any or all of the available options.*
- **Custom Query** – allows a custom query.
- **Date** – places a date field with a calendar button.
- **Document** – allows a user to upload a document.
- **Dropdown List** – places a drop-down list populated with each value added in the Value field.
- **Image** – this allows users to upload an image.
- **Lookup Type** – allow you to select from a list of Lookup fields.
- **Person** – allows you to select an existing record.
- **Phone Number** – allows you to enter a telephone number.
- **Radio List** – places a radio button for each value added in the Value field. *Users can select only one option.*
- **Rich Text Field**- allows users to enter rich text.
- **Static HTML Content** – allows user to enter HTML content.
- **Static HTML Content** – any text placed in the Value field is included as static text.
- **Textbox** – places a text box on the form. The text box will allow 255 characters.

- 13) Click **Member Custom Fields** tab, if you would like to create custom fields for each tag member.

Tag Member Custom Fields

Tag Details

Overview

Custom Fields

Member Custom Fields


Member Custom Fields

Member Custom Fields are fields that you can add to your Personal Tag so that information specific to your Personal Tag can be entered when adding a person.

Label	Visible	Required	Location	Type	Type Qualifier			
Check box option	✓		Left	Checkbox (List)	option A, option B, option C	↓	↑	✗
Dropdown List	✓		Left	Dropdown List	Option X, Option Y, Option Z	↓	↑	✗
Radio List	✓		Left	Radio List	Option 1, Option 2, Option 3	↓	↑	✗
Phone Number	✓		Left	Phone Number	Include Extension	↓	↑	✗
Textbox	✓		Left	Textbox		↓	↑	✗
New Field	✓		Left	Static HTML Content	Use this box to convey information		↑	✗

Update

Cancel

- 14) Click **Update**.
- 15) **Repeat** steps 10 through 13 for all custom fields.
- 16) On the **Members tab**, click the Add Person  icon to search and select existing records to add to the new tag.

- 17) Once people records are in a tag, you can click his or her [name](#) to view personal information, update any custom field, view or add an activity.

Tag Member Details

Tag Member Details

Personal Information

Name: [Jane Sample](#)
Birth Date: 10/3/1966
Age: 45 Years, 9 Months, 17 Days
Gender: Female
Member Status: Member
Marital Status: Married

Contact Information

Main/Home: (901) 757-2372
Cell: (901) 123-1234
E-mail: jane.sample@arenachms.com
Address (Main/Home Address):
Address: 7345 Goodlett Farms Pkwy
City/St/Zip: Cordova, TN 38016-4990
Proximity to Arena [Unable to Geocode]
Driving Directions: [Map](#)
Other Serving Tags Status
Greeters In Process

Dates

Created: 4/27/2010 3:19 PM
Last Modified: 4/27/2010 3:19 PM
Pending: 4/27/2010
Active: 4/27/2010

Serving Tag Details

Source Info Center
Status Inactive
Hours/Week 5.00
Prerequisites ☐

Activity:

New Activity: Called and Talked to Prospect
Activity Date:
Notes:
Add Cancel

Created	By	Tag	Activity Type	Activity Date	Notes
6/11/2010 2:56 PM	Jane Sample	Greeters	Status Change		Member added to 'Guest Service Volunteers' as 'In Process'.
4/27/2010 3:19 PM	Jane Sample	Door Greeter	Status Change		Member added to 'Door Greeter' as 'Connected'.

- 18) Once you create a tag, like Groups, you can print a list of members, take attendance, view the roster and upload documents.

Tag Details

Name My Church Buddies
Parent [Personal Tags](#)
Campus
Owner [Stewie Administrator](#)
Active Yes
Edit Details Print Members

Show Treeview

My Church Buddies Personal Tag	Members [6]	Occurrences	Attendance Summary	Roster	Documents
--------------------------------	----------------------	-------------	--------------------	--------	-----------

Relationships

You can set up peer networks using owner-to-member and member-to-member relationships, as shown below. Once you move a relationship scale from the weak position, Arena will calculate a numerical value that represents the strength of the relationship. The scores will show on the person details page in the Peer Networks section as seen in the **Membership→Me** section of this manual.

Peer Tag Relationships

The screenshot shows the 'Overview' tab of a tag named 'Worship Attendance'. The 'Parent' field is empty with a dropdown arrow. The 'Owner' is 'Jon Doe Sr.' with links for 'Change...' and 'Remove'. Below are two sliders for relationship strength, both currently positioned at 'Weak'.

Relationship Type	Current Strength
Strength Between Owner & Members	Weak
Strength Between Members	Weak

Tag Security Tab

The Security tab is available in the Ministry, Serving, and Event tags. Personal tags are only viewable by the person who set up the tag; therefore, security does not apply. The Security tab of the tag allows you to set specific permissions for people or Security Roles. This can allow another person to view the information in the tag, but restrict ability to edit the tag itself or the members of the tag. Be sure you always have a user in this list with at least View and Edit Security permissions, as removing all users with View permissions from this list will cause this to be a 'lost' tag that no one can view. Removing all users' Edit Security permissions will prevent you from making any further changes to the security of this tag.



Child tags inherit the security permissions of their Parent tag.



Users with permissions to specific Event Tags can view the Promotions associated with those Event Tags through the View Promotions button within the Tags. The ability to edit a tag is bundled with the ability to delete the tag as well.




Occurrences Tab

You can use Occurrences to track attendance and meeting dates just like Group Occurrences. ***See Occurrences in the Groups section of this manual.***

Attendance Summary Tab

This tab displays a summary of Occurrences for all people in the Tag or Group. You can filter by first name, last name, a date range, gender, and attendee status. Click [Apply Filter](#) to view the results. You may also select members from the grid to bulk update, e-mail, print labels in Word or export to Excel. If no members are selected all will be included in the selected function. ***Available options may vary.***

Attendance Summary Tab

Attendance Summary											
Groups Members		Registrations		Occurrences		Attendance Summary		Roster		Documents	
 First Name <input type="text"/> Last Name <input type="text"/> Gender <input type="text" value="All"/> Occurrence Name <input type="text"/> Show Non-Attendees <input type="checkbox"/>		Report From 6/21/2010  To 6/21/2011 		<input type="button" value="Apply Filter"/>							
<input type="checkbox"/>	Name	Home Phone	Gender	Birth Date	Age	First Time	Last Time	Total	Weekly Meeting 9/15/2010 7	Weekly Meeting 10/21/2010 10	
<input type="checkbox"/>	Anthony, Lola	(901) 372-2026	F	10/11/1920	90	9/15/2010	10/21/2010	2	✓	✓	100 %
<input type="checkbox"/>	Arnault, Linda	(901) 456-7894	F	10/3/1966	44	10/21/2010	10/21/2010	1		✓	50 %
<input type="checkbox"/>	Burke, Lucille	(901) 366-2153	F	7/9/1941	69	9/15/2010	10/21/2010	2	✓	✓	100 %
<input type="checkbox"/>	Burris, Linda Carol		F	4/9/1967	44	9/15/2010	10/21/2010	2	✓	✓	100 %
<input type="checkbox"/>	Currie, Lisa	(901) 957-3283	F	11/23/1972	38	9/15/2010	10/21/2010	2	✓	✓	100 %
Page: 1 2 of 2 Page Size: 5 <input type="button" value="Refresh"/> 10 Person(s)											



From the Attendance Summary page, you can select individuals to export to Excel or Word, or for Bulk Update or a New Communication.

Tag Roster

The Roster tab that is available on Small Groups is also available on Ministry, Personal, and Serving Tags. From this tab, you can sort the results by Last Name, First Name or Date Added.

Tag Roster


The screenshot shows the 'Tag Roster' interface. At the top, there are tabs: 'Manuals Ministry Tag', 'Members [4]', 'Security', 'Occurrences', 'Attendance Summary' (highlighted with a red arrow), 'Roster', and 'Documents'. Below the tabs, there is a dropdown menu 'Order By:' set to 'Last Name'. The main content area displays member information for three individuals:

- Jane Doe**: 5164 Wesley Park Dr, Memphis, TN 38135-2270
- Johnny Doe**: 7345 Goodlett Farms Pkwy, Cordova, TN 38016-4990. Main/Home: (901) 123-4567. Cell: (901) 458-7845. Email: johnndoe@johnndoe.com. A placeholder image with a question mark and the text 'Camera Shy' is shown next to his name.
- Jane Sample**: 7345 Goodlett Farms Parkway, Cordova, TN 38016. Main/Home: (901) 757-2372. Email: jane.sample@arenachms.com and jsample@hotmail.com.
- John Sample**: 7345 Goodlett Farms Parkway, Cordova, TN 38016. Main/Home: (901) 757-2372.

Print Roster

The Print Members option in Tags allows you to print a Roster with Bar Codes for each member.

Print Members

Check-In Roster		
Test Roster Tag		
Name	Phone	
Adams, Allen		<input type="checkbox"/> 
Alexander, Anita G	(901) 372-1331	<input type="checkbox"/> 
Alley, Alvin	(972) 662-5897	<input type="checkbox"/> 

Steps to Edit the Tag Security:

- 1) Go to the respective **Tag**.
- 2) Click the [link](#) to the appropriate tag.
- 3) Click the **Security tab**.

Security Tab

The screenshot shows the 'Security' tab for a tag named 'Worship Attendance Ministry Tag'. The interface includes a 'Members [3]' count and a 'Security' tab header. Below the header, there are two main sections: 'Available Roles' and 'Current Roles/People'. The 'Available Roles' section has a dropdown menu with '[Select Role]' and an 'Add Role' button. The 'Current Roles/People' section has a list box containing 'Arena Administrators [role]', 'Ministry Tag Administration [role]', and 'Staff Members [role]'. There is an 'Add Person...' button and a 'Remove' button. Below these sections is the 'Access Allowed for Arena Administrators' section, which contains four checkboxes: 'View', 'Edit', 'Edit People', and 'Edit Security'. All four checkboxes are checked. At the bottom, there are 'Update' and 'Cancel' buttons.

- 4) Select a Security Role from the **Available Roles** drop-down and select **Add Role**, or click the **Add Person...** to search and select an existing Record.
- 5) Make the desired access selections in the Access Allowed area.
View – This access allows users to view the tag.
Edit – This access allows users to edit the tag details.
Edit People – This access allows users the ability to edit people in the tag.
- 6) Click **Update**.

COMMON TAG QUESTIONS

Steps to Subscribe to a Tag

You can subscribe to a Tag by checking the Checkbox next to any Tag. Tag subscriptions will place the Tag on your home page along with the numbers of Pending Registrations, Critical Registrants (for Serving Tags only), and Total number of Connected members, as shown below.


Subscribing to Tags

<u>Subscribe</u>	<u>Name</u>
<input checked="" type="checkbox"/>	Cafe Workers
<input type="checkbox"/>	Children's Ministry Volunteers
<input checked="" type="checkbox"/>	Guest Services Volunteers
<input type="checkbox"/>	Outreach







Home Page Tag Subscriptions

Ministry Tags All Staff (187;0)
Serving Tags Church Employee Tags (8;3;44) Guest Service Volunteers (5;0;0)

Steps to Make a Tag Inactive:

By default, new tags are active. The light bulb  icon in the **Active** column indicates that the tag is active. Tags are active by default upon creation. De-selecting the **Active Only** box will display all tags.

Tag Status

Apply Filter					Active Only	
Subscribe	Name	Active	Ministry Tags	Total Members		
<input type="checkbox"/>	All Staff			189		
<input type="checkbox"/>	Church Committee					

- 1) Go to **Tag** you want to make inactivate.
- 2) Click the **Edit Details** button.
- 3) Uncheck the **Active** checkbox.

Small Group Members

Overview
Custom Fields

Leader

Ethel Mertz [Change...](#) [Remove](#)

Active

☒

Group Name

WIC

Parent

--Monthly Groups


Group URL

Location

Passage Community Church


- 4) Click the **Update** button to save.

Steps to Delete a Tag:

- 1) Go to the respective Tag tree and click through the tag tree until the desired tag displays on the tag list page. *You can delete a tag only at the lowest level of the tag tree.*
- 2) Click the Delete  icon that is in the same row as the tag you want to delete. *A notice will pop up indicating that you are deleting the tag and removing the members from this tag.*
- 3) Click **OK** to confirm that you want to delete the tag.

Steps to Make a Person Inactive in a Tag:


- 1) Go to respective Tag and locate the **person**.
- 2) Click the person's [name](#).
- 3) Click **<Tag> Tag Details**.

Personal Information Name: Gracie Allen Birth Date: 11/5/1960 Age: 51 Years, 1 Months, 8 Days Gender: Female Member Status: Member Marital Status: Married		Contact Information Main/Home/Primary: (901) 372-8264 Address (Main/Home Address): Address: 3597 Southern Ave City/St/Zip: Memphis, TN 38111 Proximity to Passage Community Church [Unable to Geocode] Driving Directions: Map	
Dates Edit Created: 11/25/2008 11:55 AM Last Modified: 11/25/2008 11:55 AM Pending: 11/25/2008 Active: 11/25/2008			
Personal Tag Details 			
Source Unknown Status Connected			


- 1) In the Status drop-down, select **Inactive**.
- 2) Click **Update**.

Ministry Tag Details	
Source	Unknown ▼
Status	Connected ▼
Move To	In Process Connected Inactive New Request
Notes	

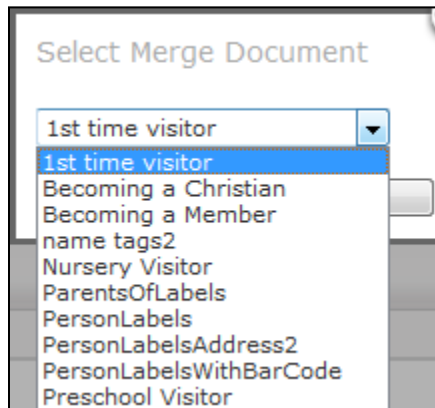
Steps to E-mail Tag Members:

- 1) Select the respective **Tag**.
- 2) Select the records for which you would like to e-mail. *If you select none, all records across all pages will be included.*
- 3) Click the **e-mail**  icon at the bottom right corner of the Members tab. *See the **Communications** section of this manual for specific steps.*

Steps to Create Mailing Labels for Tag Members:


- 1) Select the respective **Tag**.
- 2) Select the records for which you would like to create labels. *If you select none, all across all pages will be included.*
- 3) Click on the Word  icon at the bottom right corner of the Members tab.
- 4) Select **Person Labels** from the Merge Document pop-up drop-down.

Merge Document Pop-up




- 5) Click **Update** to complete the merge.

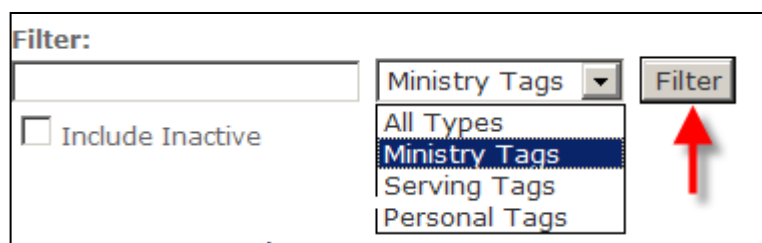
Steps to Export Tag Member Information to a Spreadsheet:

- 1) Select the respective **Tag**.
- 2) Select the records for which you would like to export. *If you select none, all across all pages will be included.*
- 3) Click on the Excel  icon at the bottom right corner of the Members tab.
- 4) A window will display, giving you the option to open or save the spreadsheet.

Steps to Change the Parent of a Tag:

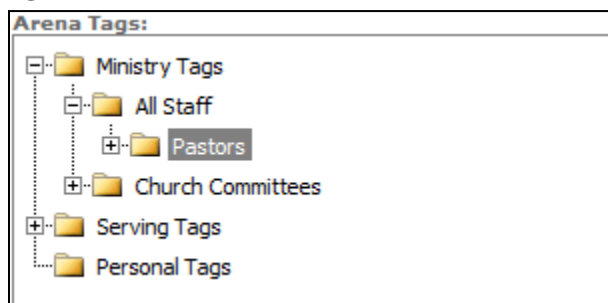
- 1) Select the **Tag**.
- 2) Click **Edit Details**.
- 3) Click the  button.
- 4) Select the **Tag Type** from the Filter drop-down.

Tag Filter



- 5) Select the new **Parent Tag**.

Tag List



- 6) Click **OK**.
- 7) Click **Update**.




If moving to the top level of a non-Personal Tag, the user must have module edit rights.

Serving Tags

You can use Serving tags to track prospects and volunteers who serve in a ministry area, such as guest service workers and children’s ministry volunteers.

Steps for setting up a new Serving Tag:

- 1) Go to Tags → Serving Tags.
- 2) Click the Add link if this is the first Serving tag in your system or click the Add New Serving Tag  icon on the bottom right-hand corner if you have existing tags.
- 3) On the Overview tab, enter a **name**.
- 4) Select **campus**, if applicable.
- 5) Enter **start** and **end time**, if applicable.
- 6) Change **owner**, if applicable.
- 7) Adjust **relationship** strength, as desired.

New Serving Tag Overview

Tag Details

Overview

Serving Criteria

Serving Details

Custom Fields

Member Custom Fields

Name

1st Weekend 9:30am Service Coneheads

Active ☒

Parent

1st Weekend ...

Campus

Main Campus ▾

Default Start Time

Default End Time

Owner

Jane Sample

[Change...](#) [Remove](#)

Relationships

Strength Between Owner & Members

Weak

Moderate

Strong

Strength Between Members

Weak

Moderate

Strong

Internal Notes

This is for 1st Sunday ONLY.

Custom Fields

Sample Custom Field ▾

Update

Cancel

- 8) Click the Serving Criteria tab.

- 9) Enter and select **criteria**, as desired.

Serving Tag Criteria

The screenshot shows the 'Serving Tag Criteria' form with the following sections and fields:

- Display to Public:** ☒
- Category Level:** ☐
- Critical Need:** ☐
- Default Hours/Week:** 1.50
- Volunteers Needed:** 10
- Contact Info:** Gary Johnson
- Contact Email:** gary@passagepres.org
- Video Link:** (empty field)
- Category Photo:** Update Photo...
- Serving Photo:** (Image of a person in a blue uniform) with links: Remove Serving Photo, Update Serving Photo...
- Weekly Commitment:** ☒ 1-2 Hours ☐ 3-5 Hours ☐ 6+ Hours
- Timeframe:** ☐ Weekdays ☐ Weeknights ☒ Weekends
- Classification:** ☐ Behind the Scenes ☒ Upfront
- Content Category:** ☐ Jr High Site ☐ High School Site ☐ Default ☒ Arena
- Duration:** ☐ Ongoing ☐ Short Term ☐ One Time ☒ 1st Sunday ☐ 2nd Sunday ☐ 3rd Sunday ☐ 4th Sunday
- Spiritual Gifts:**
 - ☐ Faith ☐ Leadership ☐ Encouragement ☐ Administration ☐ Wisdom ☐ Discernment
 - ☐ Service ☐ Hospitality ☐ Helps ☐ Mercy ☐ Craftsmanship ☐ Prophecy
 - ☐ Missions ☐ Intercession ☐ Giving/Generosity ☐ Teachnig ☐ Pastoralship ☐ Knowledge
 - ☐ Arts ☐ Evangelism ☐ Music ☐ Healing ☐ Praying in Tongues

- **Display to Public** – Select this box if you would like to display this serving opportunity on your Arena-managed website.
- **Category Level** – Select this box for this tag to be a category on your Arena-managed website such as, Guest Services with Greeters as a sub-level tag.
- **Critical Need** – Select this box to denote if this tag is a critical need. *If selected, the tag will display on the initial Serving Opportunities page of your Arena-managed website.*
- **Default Hours/Week** – Enter the number of hours per week required for this serving opportunity.
- **Volunteers Needed** – Enter the number of volunteers needed for this opportunity. *Once this tag has this number of volunteers with a connected status, it will no longer be available on your Arena-managed website.*
- **Weekly Commitment, Timeframe, Classification, Content Category, and Duration** are criterion that allows website users to search a select a serving opportunity. ***These options will vary. See your Arena Administrator regarding customization for your organization.***



You must select a Content Category for the serving opportunity to be available on your Arena-managed website for registration purposes.

- 10) Select the **Serving Details** tab.

11) Enter information for **each section**, as desired.

Serving Details Tab

The screenshot shows the 'Serving Details' tab with the following content:

- Summary:** Coneheads are the cheerful volunteers whom direct traffic for 9:30am Service. Member and Non-Members are welcome to serve in these positions
- Details:** Coneheads will direct traffic from all entry points as well as on campus to where parking is available. Positions will be assigned in Room 300 (just behind the visitor's station) each Sunday.
- Experience Skills:** Volunteers must be able to stand up to 1 hour. Volunteers must be at least 18 years of age.
- Schedule Notes:** Volunteers must be available at least 20 minutes prior to the start of service. Coneheads will direct traffic from 9:10 until 9:45am.

12) Click **Custom Fields** tab to create custom fields.

Tag Custom Fields

The screenshot shows the 'Custom Fields' tab with the following table:

Label	Visible	Required	Location	Type	Type Qualifier	
Sample Custom Field	✓		Left	Dropdown List	Sample A, Sample B, Sample C	

13) Click the **Member Custom Fields** tab.

14) Add **custom fields**, as desired. *See detailed instructions in the Ministry Tag section of this manual.*

Serving Tag Member Custom Fields

The screenshot shows the 'Member Custom Fields' tab with the following content:

Member Custom Fields
Member Custom Fields are fields that you can add to your Serving Tag so that information specific to your Serving Tag can be entered when adding a person.

Label	Visible	Required	Location	Type	Type Qualifier	

Custom Field Modules
Field Modules are pre-configured groupings of Custom Fields that can be added to your Serving Tag. If you have a group of fields that you consistently use, these fields can be set up as a Field Module so that you can easily add them here. The Arena Administrator(s) can set these field modules up for you.

Category	Module	Attributes	Remove
Add New Field Module:		Children's Ministry Event Fields	

15) Click **Update**.

Steps to Add and Existing Record as a Registrant to a Serving Tag:

- 1) Click **Add Volunteer** under Volunteer Tracking.
- 2) Click the [Add...](#) link to search and select for the existing record.
- 3) Select the **Source**, in how the person learned of the volunteer opportunity.
- 4) Click the [Choose...](#) link to search and select a Serving tag.
- 5) Enter **Comments**, as desired.

Add Volunteer Page

Add a new volunteer.

Individuals: ✖ [Joan Sample](#) [Add...](#) [Clear All](#)

Source: Word of Mouth ▼

Ministries: Guest Service Volunteers [Choose...](#)

Comments: would like to be contacted regarding open positions

- 6) Click **Add**. Arena will add the person to the tag, with the default status of **In Process**.

Tag Sorting

On the tag page, you can sort by any single column. Click a column heading to sort in ascending or descending order.

Column Sorting

Subscribe	Name	Active	Ministry Tags	Total Members	
<input type="checkbox"/>	Board of Deacons			8	
<input type="checkbox"/>	Board of Elders			9	

Tag Filters

On the **Tag Members** tab, you can filter members by status. *Options vary by tags and specific status options may vary for your organization.*

Serving Tag Filter

Cafe Workers Serving Tag		Members [12]	Security	Occurrences	Attendance Summary	Roster	Documents
	First Name <input type="text"/>	<input checked="" type="checkbox"/> No Contact	<input type="checkbox"/> Unable to Serve	<input type="checkbox"/> In Process	<input type="checkbox"/> Inactive		
	Last Name <input type="text"/>	<input type="checkbox"/> Background Check Pending	<input type="checkbox"/> No Response	<input type="checkbox"/> Connected			
	<input type="button" value="Apply Filter"/>	<input type="checkbox"/> In Training	<input type="checkbox"/> Already Serving	<input type="checkbox"/> New Request			
			<input type="checkbox"/> Place Elsewhere				

- **No Contact** - This is the default status applied to new prospects. You should contact the prospect within one week. Once you make contact, you can change the status to 'In Process' or whatever is the next step in your organization's process.
- **In Process** - This status applies to contacted prospects; their response is pending.
- **Background Check Pending** - This status is used for prospects who have committed to serve, but must have a background check approved before starting to serve.
- **Unable to Serve** - This status is for prospects that are not able to serve in the ministry for which they originally volunteered. When changing the status to 'Unable to Serve' you must provide a reason. The volunteer coordinator will review these prospects and remove them.
- **No Response** - This status is for prospects who do not respond to your efforts to contact them.
- **Already Serving** - This status applies to prospects who tell you that they are already serving when you contact them. Be sure to record where the prospect is serving in the reason field. The volunteer coordinator will review these prospects and remove them.
- **Place Elsewhere** - This status is if the prospect wishes to serve in a different area.
- **Connected** - This is the default status for a person, once you place him or her in the serving tag.
- **Inactive** - This status applies to a person who is part of the ministry but for some reason is not currently participating. For example, if there is a volunteer on your team who is taking a month's vacation, change him to inactive. When the person returns update him back to active.

Event Tags

You can use Event tags to track people who sign up for an event like a conference or a class. Event tags differ from other tags because they have a specific begin and end date and can process payments. They also allow Sub-Events such as a conference with individual classes. The following instructions provide you with the steps for Events with Sub-Events.


Considerations when using Sub-Events:

- Each sub-event has its own name, start time, end time, etc.
- Custom Fields are only available for a parent, not for the sub-events.
- Each sub-event can also have its own costs, fees, and discounts.
- The user will make one payment for multiple events when registering.
- Sub-events cannot have sub-events. You can create only one level of sub-events.

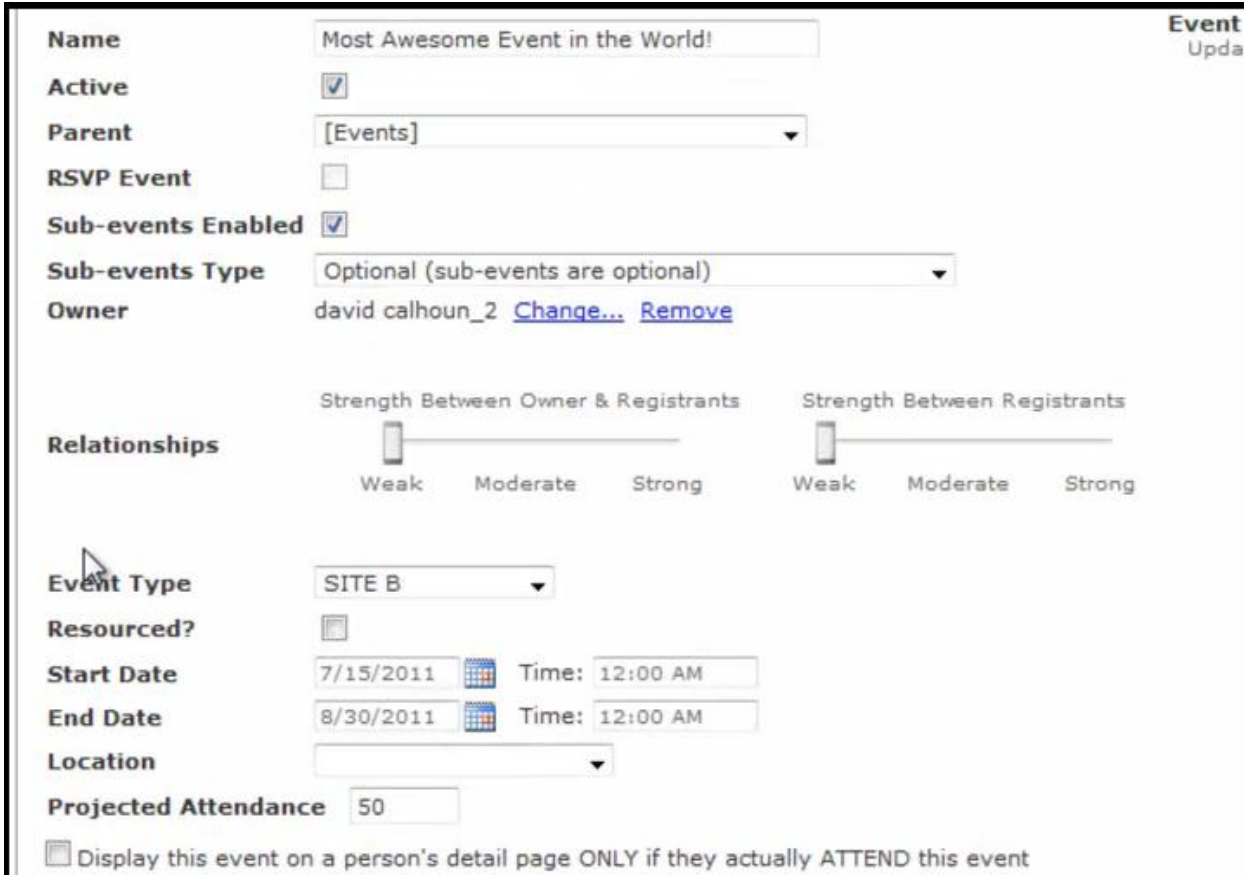
Considerations when using RSVP Events:

- Payments are accepted.
- Discounts are not available.
- Sub-events are not available.

Steps to Create an Event Tag:

- 1) Go to Tags → Event Tags.
- 2) Click the Add link if this is the first event tag in Arena. If Tags already exist then click the Add New Event Tag  icon.
- 3) Enter the **event details** on the Event Details tab.

New Event Tag Details



Name Most Awesome Event in the World!

Active ☒

Parent [Events]

RSVP Event ☐

Sub-events Enabled ☒

Sub-events Type Optional (sub-events are optional)

Owner david calhoun_2 [Change...](#) [Remove](#)

Relationships

Strength Between Owner & Registrants: Weak Moderate Strong

Strength Between Registrants: Weak Moderate Strong

Event Type SITE B

Resourced? ☐

Start Date 7/15/2011 Time: 12:00 AM

End Date 8/30/2011 Time: 12:00 AM

Location

Projected Attendance 50

☐ Display this event on a person's detail page ONLY if they actually ATTEND this event

- **Name** – This is the name for the event. If this event has classes, they will likely be sub-events.
- **Active** – Indicates this event is an active event.
- **RSVP Event** – Check this box if you would like to allow users to register multiple people without requiring data to be entered for each person. *This option is available for Event Tags with no Sub-Events.*
- **Parent** – This is the parent of this event tag. If this is the top-level tag, Events will be the Parent.
- **Sub-events Enabled** – Check this box to create sub-events. *ONLY top-level events can have sub-events. Sub-events cannot have sub-events.*
- **Sub-events Type** – Lets you specify what type of sub-events should be available for this event. Options are:
 - Required (user must choose at least one sub-event) *Consider this option if the parent event is just used to group events together.*
 - Optional (sub-events are optional)
- **Owner** – By default, the person creating the event will be the owner. To change the owner, click [Select](#).
- **Peer Relationships** – Set the relationship strength, as desired.

- **Event Type** – This is a filter on your organization’s Arena managed website.
- **Resourced** – Use this feature to a schedule and resources set up in MinistrEspace. *Use this option if your organization has an account with MinistrEspace.*
- **Start and End Dates** – These are the dates for the actual event.
- **Location** – This is the location of the event.
- **Projected Attendance** – This is the number of people you are expecting. The number of registrants can be limited on the Registration Details tab under Registration.
- **Display this event on a person’s detail page ONLY if they actually ATTEND this event** – If you select this box and take attendance, this event will display on the Person Detail page for the registrant.
- **Summary** – This is the event summary displayed on your organization’s Arena managed website.
- **Event Details**- This is the details of the event displayed on your organization’s Arena managed website.

4) If using MinistrEspace, select the **Page Picker** to select an existing event in MinistrEspace.

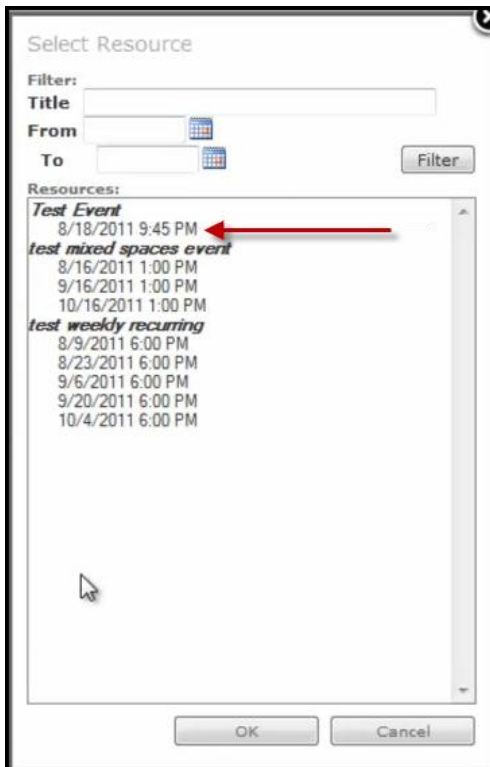
Resourced Page Picker



The image shows a form titled "Resourced?". It has two input fields: "Selected Resource" and a checkbox. A red arrow points to the "Selected Resource" field. The checkbox is checked.

5) Select an event from the **pop-up**. You can also use the filter and date field filters to search for the desired event. *This pop-up displays approved MinistrEspace events.*

MinistrEspace Event Pop-up



The image shows a "Select Resource" pop-up window. It has a "Filter:" section with "Title", "From", and "To" fields, and a "Filter" button. Below this is a list of "Resources:" with the following items:

- Test Event
- 8/18/2011 9:45 PM
- test mixed spaces event
- 8/16/2011 1:00 PM
- 9/16/2011 1:00 PM
- 10/16/2011 1:00 PM
- test weekly recurring
- 8/9/2011 6:00 PM
- 8/23/2011 6:00 PM
- 9/6/2011 6:00 PM
- 9/20/2011 6:00 PM
- 10/4/2011 6:00 PM

A red arrow points to the "Test Event" entry. At the bottom are "OK" and "Cancel" buttons.

- 6) Click **OK** to return to Event Details.
- 7) Arena will populate date fields using the MinistrEspace dates.

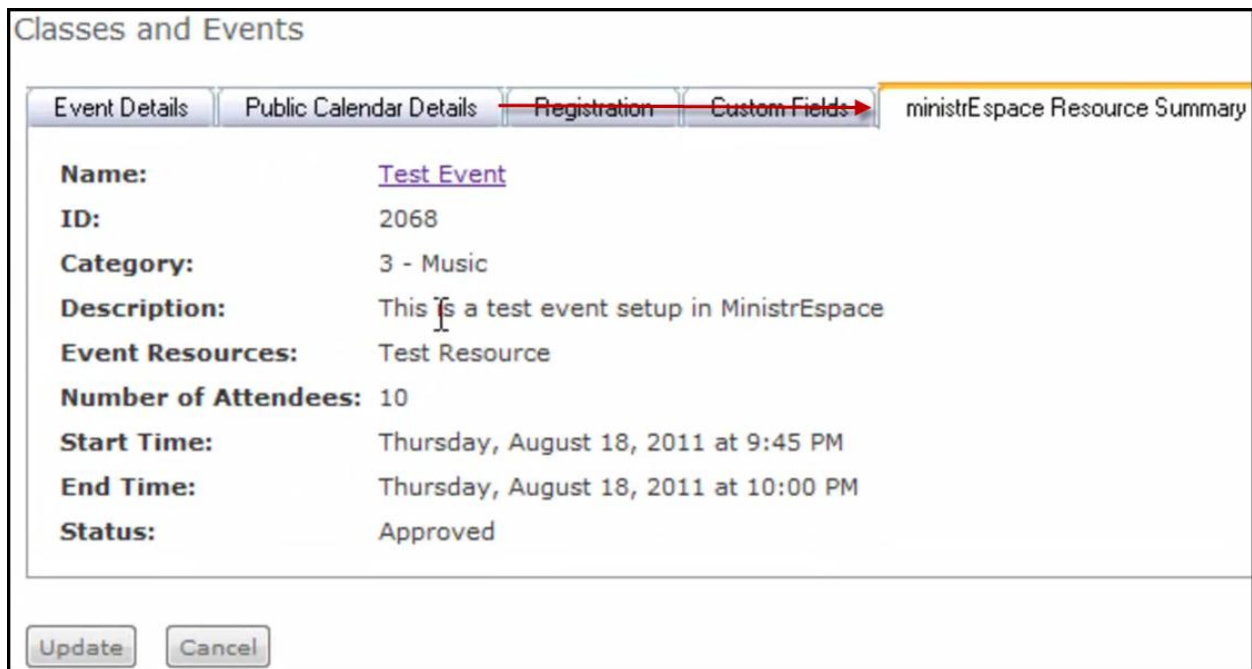
Resourced Details



The 'Resourced Details' form contains the following fields:

- Resourced?** A checkbox that is checked.
- Selected Resource** A text field containing 'Test Event' and a small dropdown arrow icon.
- Start Date** A date picker showing '8/18/2011' with a calendar icon.
- Time:** A time picker showing '09:45 PM'.
- End Date** A date picker showing '8/18/2011' with a calendar icon.
- Time:** A time picker showing '10:00 PM'.

- 8) There will now be a new **MinistrEspace Resource Summary** tab for this Event. Select the [Event Link](#) to access MinistrEspace page. If you change the dates of an event in MinistrEspace, use the page picker to reselect the event in order for changes to take effect.



The 'Classes and Events' window displays a tabbed interface with the following tabs: 'Event Details', 'Public Calendar Details', 'Registration', 'Custom Fields', and 'ministrEspace Resource Summary'. The 'ministrEspace Resource Summary' tab is currently selected. The main content area shows the following details for the event:

- Name:** [Test Event](#)
- ID:** 2068
- Category:** 3 - Music
- Description:** This is a test event setup in MinistrEspace
- Event Resources:** Test Resource
- Number of Attendees:** 10
- Start Time:** Thursday, August 18, 2011 at 9:45 PM
- End Time:** Thursday, August 18, 2011 at 10:00 PM
- Status:** Approved

At the bottom of the window are two buttons: 'Update' and 'Cancel'.

- 9) Click **Update** or **Cancel** to continue creating this event.

10) Click the **Public Calendar Details** tab, as shown below, and fill in the fields as needed.

New Event Tag Public Calendar Details

- **Contact Name, Phone and E-mail** – This is the contact information displayed on the page for this event on your organization’s Arena managed website.
- **External Link** – If used, this link will be the web page redirect to the proper URL used for registration for this event.
- **Visibility** – Select Public if the event should be available on your organization’s Arena managed website.
- **Primary Ministry** – This determines the page on your organization’s Arena managed website where this event will display.
- **Alternate Ministry** – By selecting any other of these options, this event can be available on other Arena managed website pages.



Along with a future Occurrence, the Event must be approved in order to display on the website.

11) Click the Registration tab and check the **Enabled** box to display options for Online Registration.



Edit Registration security is required to view and edit the Registrations tabs. *Child tags of a Parent with Edit Registration permissions will also have Edit Registration permissions enabled for the same user. See **Taa Security** in this manual for more information.*

New Event Tag Registration Details

The screenshot shows the 'New Event Tag Registration Details' form. The 'Registration' tab is selected, and the 'Online Registration' section is expanded. The 'Enabled' checkbox is checked. The 'Registration Start Date' is 4/1/2010 at 10:00 AM, and the 'Registration End Date' is 6/20/2010 at 09:00 PM. The 'Allow Multiple Registrants per Registration' checkbox is unchecked, and the 'Max #' is 0. The 'Allow Anonymous Registration' checkbox is unchecked. The 'Description' section is empty, with a rich text editor toolbar visible above it.

- **Enabled:** This enables the six Registration tabs.
- **Registration Start and End Dates:** These are the dates and times the event should be available on-line for registrations.
- **Limit Registrations:** The maximum number of registrations allowed. If using “Allow Multiple Registrants...,” Arena lists only the open slots. Example: If three slots are available and the user would like to register four, only three will be available in the drop-down.
- **Allow Multiple Registrants:** The maximum number of people who can register together.
- **Allow Anonymous:** To allow persons to register without having to login. This option will create a registration, as an anonymous registration and add the registrants into the database as records.

12) Click the **Fields** sub-tab, as shown below, to select the fields to use for on-line registration for this event.

New Event Tag Registration Fields

Event Details Public Calendar Details Registration Custom Fields




Registration Details **Fields** Communication Payments & Fees Discounts Advanced

Standard Field Settings

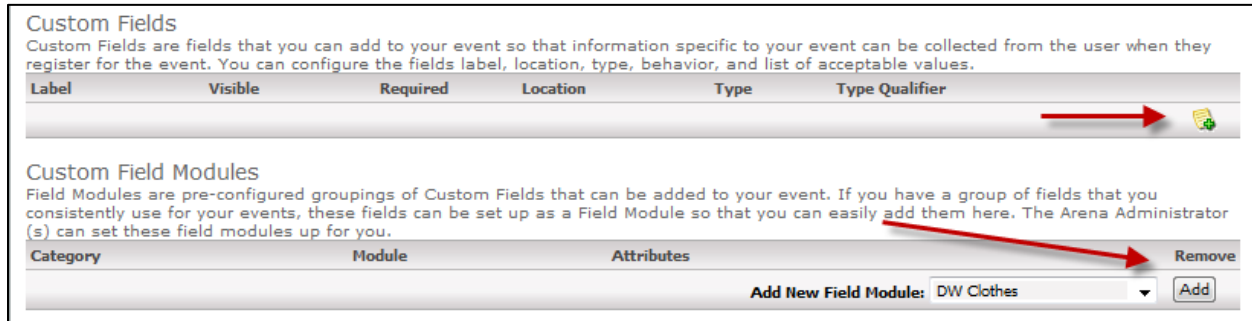
Below are the Standard Fields that can be used for this event. Select the 'Use' option if you'd like the field to be displayed for the user to enter when they register for this event. You can also make the field required by clicking the 'Required' column. When a user is registering multiple individuals, information they enter for the first registrant will automatically be copied to the additional registrants for any of the fields that you select 'Auto Fill'. The first registrant's info will also be automatically entered for each field with 'Auto Fill' if the person is logged in. When entering new individuals, the system uses First Name, Last Name and Birthdate for matching. Always include these fields to increase the chances of matching individuals properly.

	Use	Required	Auto Fill	Show On Summary	Order
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
Nick Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4
Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5
Home Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6
Work Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7
Cell Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10
Gender	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11
Birth Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12
Marital Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13
Anniversary Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14
Social Security #	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15

- **Use** – Check these boxes for fields you want to be on the event registration form.
- **Required** – Check these boxes for fields that are required to complete on the event registration form.
- **Auto Fill** – Check these boxes for events where a login is required. The fields will populate, using data from existing records. *This option applies to events behind a login on the Arena-managed website.*
- **Show on Summary**—Check these boxes for fields you want to display on the registration summary page.
- **Order** – Change the numbers in the order column to change the display order on the registration page.

- 7) To add a Registration Custom Field, select the New Custom Field  icon, and then click the Edit Custom Field  icon. Fill in the required fields as needed. To change the order of Custom Fields use the  arrow button.

Custom Fields




- **Title** – This is the name of the Custom Field.
- **Title Location** – You can select the location for the fields, which are left, right, top, or bottom.
- **Type** – You can select the type of field. The options are:
 - **Address** – this field gives users the ability to enter an address.
 - **Area** – this field enables you to select an available area. *You can create Areas in Groups.*
 - **Checkbox** – this field enables you the ability to create a multi-select list of options for users.
 - **Custom Query** – this field enables you the ability to enter a custom query.
 - **Date** – this field allows users to enter a date.
 - **Document** – this field enables users the ability to attach a document. *You must create at least one Document Type for this field to be available.*
 - **Dropdown List** – this field enables you the ability to create a drop-down list of options for users to select.
 - **Image** – this field enables users the ability to upload an image.
 - **Lookup Type** – this field enables you the ability to select an existing drop-down from Lookups.
 - **Person** – this field enables users the ability to search for a single existing record. *Person Page ID is "7".*
 - **Phone Number** – this field enables users the ability to enter a 10-digit telephone number with the option to enter an extension.
 - **Radio List** – this field enables you the ability to create a single-select radio list of option for users.
 - **Rich Text Field** - this fields enables you the ability to enter rich text.
 - **Static HTML Content** – this field enables you the ability to enter HTML content.
 - **Static HTML Content** – this field enables you the ability to enter static text.
 - **Textbox** – this field enables users the ability to enter text.
- **Rows** – This option, used when field type is textbox, enables word wrapping for the number of entered rows.
- **Pixels Wide** – This option, used when field type is textbox, enables you to enter a value that represents the width of the field box.
- **Value(s)** – Depending on the Field Type, you may be required to enter a value for the choices presented. *Field Types that require this are checkbox, radio, drop-down, and static. These values are comma delimited for multiple values.*

- **Visible** – Check this **box** to make the field **visible** (both internally and externally).
 - **Required** – Check this box for fields that are required to select or complete.
 - **Read Only** – Check this box for view only fields. *This will make the field display as a disabled field (grayed out).*
 - **Enable Auto-Fill** – Check this box for the field to auto-populate, using Arena data. *This option is applicable when users must login first.*
 - **Show on List** – Check this box for fields to display on the confirmation page of event registration.
- To enter a new **Custom Field Module**, select the Module/control from the drop-down list in the Custom Field Modules area and click the Add button. Your Arena Administrator can create these modules.


Custom Field Modules

Custom Field Modules

Field Modules are pre-configured groupings of Custom Fields that can be added to your event. If you have a group of fields that you consistently use for your events, these fields can be set up as a Field Module so that you can easily add them here. The Arena Administrator(s) can set these field modules up for you.

Category	Module	Attributes	Remove
Church Wide Events	Medical	All Boosters (Arena.Portal.UI.FieldTypes.CheckBoxField) Immunization is current (Arena.Portal.UI.FieldTypes.CheckBoxField)	

Add New Field Module:

To remove a Custom Field or Custom Field Module, click the Remove  button next to the field/module you want to remove.

10) Click the **Communication** tab.

11) Click the **Enabled** checkbox and complete the required information for each e-mail option.

Event Communications

Registration Details
Fields
Communication
Payments & Fees
Discounts
Advanced

Communication Settings

This settings will be used for both Registration Confirmations and Reminder(s)

From Name

From Email

Merge Fields
##ContactEmail##, ##ContactName##, ##ContactPhone##, ##Details##, ##End##, ##ETicketLink##, ##Location##, ##OrganizationName##, ##Registrants##, ##Start##, ##SubEventDetails##, ##Summary##, ##Title##, ##TotalCost##, ##TotalDue##, ##TotalPaid##

Registration Confirmation ☒ Enabled

If enabled, the system will send a registration confirmation that includes details of the event and the registration. You can also include additional information and/or attachments on the email by entering them here.

Subject:

ABC
Insert
Link
Image
Table
Form
Code
Undo
Redo
Print
Fullscreen
Help

B
I
U
List
Indent
Outdent
Align
Text Color
Background Color
Link
Unlink
Image
Table
Form
Code

Font Name
Size
Apply CSS Cl...
Merge Fields

Design
HTML
Preview
Words: 0 Characters: 0
Zoom


- **Registration Confirmation** – Enter a subject and text to send an e-mail to each person who registers for the event, confirming his or her registration.
- **Event Reminders** – Enter a subject and text to send an e-mail to each registrant, reminding him or her of the event. You can send up to two reminder e-mails.
- **E-Tickets** – Select an available e-ticket, as desired.
- **Notify Owner** – Check this box if the event tag owner would like to receive e-mail notification when someone registers for the event online.


12) Click the **Payments & Fees** tab.



A Payment Gateway account is required. See your Arena Administrator for more information.

13) Click the **Enabled** checkbox.

14) Click the **Add New Fee**  icon in the **Event Costs** and **Additional Fees** sections to add fees for this event, as desired.

15) Click the **Edit Fee**  icon to enter the fee information.

If using sub-events:

- Only one "discount code" text box displays, but each sub-event can have its own discount code.
- You can use the same text for the discount code on sub-events but assign different discount percentages or discount amounts.
- Sub-events do not require payments or fees.
- To allow registration without payment, set the due date for a future date. To require payment, set the date due to the current or past date.

16) Select **Payment Gateway(s)**. *You can select one payment gateway for credit card payments, and a second for ACH payments.*

New Event Tag Registration Payments & Fees

Event Details	Public Calendar Details	Registration	Custom Fields
Registration Details	Fields	Communication	Payments & Fees
<div> <div>Discounts</div> <div>Advanced</div> <div>Registration Steps</div> </div>			

Event Costs (Payments)

☒ Enabled

If this event requires a payment, you can use this area to specify information about the amount and due date required for each payment.

Title	Active	Amount	Discount Applies	Date Due	Note
Full Payment		\$75.00		7/16/2012	Discount will be applied on the following page.
Deposit		\$25.00		5/1/2012	

Additional Fees

☒ Enabled

If this event has any additional optional fees, you can use this area to specify information about the additional fee(s).

Label	Amount	Active	Required	Type	Values
T-SHIRT	\$8.00			Dropdown	S,M,L,XL

Payment Processing

This area is used to specify the Payment Gateway and Accounting Code to use for this event. The Payment Gateway is the online service that should be used when processing credit card transactions on the website. The Accounting Code should specify the Finance Account used to track payments for this event. If unsure about what values to use, please contact the Finance department or the Arena Administrator(s).

Credit Card Account Gateway

PDS CC

Checking Account Gateway

PDS ACH

Accounting Code

123456

17) Click the **Discounts** tab to create specific discounts for the event and fill in the required fields as shown below. You can enter percentages, including 100% or dollar value discounts. *Percentage discounts apply before dollar discounts.*

New Event Tag Registration Discounts

Group Discount ☒ Enabled
 If this event provides a discount for registering a group of people, you can use this area to specify the discount amount and how many registrations are required to receive the discount.
 Group Size
 Discount ☒ 5.00 % OR ☐ \$ per eligible cost/fee.

Early Bird Discount ☒ Enabled
 If this event provides a discount for registering early, you can use this area to specify the discount amount and when the discount ends. If there will be multiple payments, the discount will be applied to all payments as long as the first payment is made before the end date. If you want only those payments that are made before the date, unselect the 'Use First Payment Date' option.
 End Date
 Discount ☒ 10.00 % OR ☐ \$ per eligible cost/fee.
 Use First Payment Date ☒

Discount Codes ☒ Enabled
 If this event provides one or more discounts based on a discount code, you can use this area to specify the information about each discount code.

Code	Discount (Percent)	Discount (Amount)	Limited	Max Allowed	Used	Start	End
VB5001	100.00 %	\$0.00	<input checked="" type="checkbox"/>	5	0	5/1/2012	5/5/2012

Group Discount – This discount will reduce the price for every group member.

Early Bird Discount – This discount offers a price reduction before a specific date.

Discount Codes – Use this additional discount for custom discounts like scholarships, staff or testing.

- *Max Allowed controls how many times to use the specified discount code, regardless of the number of registrants.*
- *The Limited checkbox tells Arena how many times to limit use of the Discount Code, based on the Max Allowed number. However, it only will limit the number of times to use the code on the external site. If the Limited checkbox is unchecked, you can enter the discount code as many times as you like.*
- *Each registrant can use one discount code.*
- *Early Bird Discounts end the morning of the end date. For example, if the discount ends July 1st, enter July 2nd as the end date.*

18) Click the **Advanced** tab to choose what labels the system will use when someone registers for the event, as shown below.

If you are using sub-events, only custom fields from the parent Tag event display.


Advanced Event Tag Label Setup

Label Setup
 Use the options below to specify the labels the system should use when a person registers for the event.

Additional Fee Label
 Discount Code Label
 Registration Fee Label
 Registration Unit
 Event Description
 Registration Label

19) Select the **Custom Fields** tab to add fields for Tag members.

The screenshot shows the 'Custom Fields' tab selected in the top navigation bar. Below the tabs, there is a section titled 'Custom Fields' with a description: 'Custom Fields are fields that you can add to your Events so that information specific to your Events can be entered.' Below this is a table with columns: Label, Visible, Required, Location, Type, and Type Qualifier. There is a green plus icon in the bottom right corner of this section. Below the table is a section titled 'Custom Field Modules' with a description: 'Field Modules are pre-configured groupings of Custom Fields that can be added to your Events. If you have a group of fields that you consistently use, these fields can be set up as a Field Module so that you can easily add them here. The Arena Administrator(s) can set these field modules up for you.' Below this is a table with columns: Category, Module, Attributes, and Remove. At the bottom right, there is a dropdown menu labeled 'Add New Field Module:' with 'DW Clothes' selected, and an 'Add' button.

 When using sub-events, you can set Custom Fields for the Sub-Events on the Sub-Event page.

20) If using the optional Registration Steps tab, add all 5 steps. (Futures updates will allow you to select only the steps needed for your event configuration).


The screenshot shows the 'Registration Steps' tab selected in the top navigation bar. Below the tabs, there is a section titled 'Registration Steps' with a list of steps: 'Event Registration - Step 1', 'Event Registration - Step 2', 'Event Registration - Step 3', 'Event Registration - Step 4', and 'Event Registration - Step 5'. Each step has a blue up arrow and a blue down arrow to its right, indicating they can be reordered. To the right of each step is a green plus icon and a red X icon. At the bottom left, there is a 'Page: 1 of 1' label, a 'Page Size: 336' label, a 'Refresh' button, and a '5 Step(s)' label. At the bottom right, there is a red arrow pointing to a green plus icon and a green X icon.

21) Click **Update**.

22) Click **Promote This Event** button, if you would like to create a separate promotion.

View Promotion

The screenshot shows a dialog box titled 'View Promotion'. It contains two buttons: 'Edit Details' and 'Promote This Event'.

 If you have access to a specific Event Tag, you will also have access to the associated Promotion.

23) If you would like to allow on-line registration, you will need to create a future occurrence. If a future Occurrence is not created, the below pop-up will display.

Event Occurrence

The screenshot shows a pop-up dialog box titled 'Windows Internet Explorer'. It contains a question mark icon and the text: 'There are no future occurrences attached to the event connected to this promotion. Click OK to be redirected to create an occurrence.' Below the text are two buttons: 'OK' and 'Cancel'.

- 24) Click **OK** to proceed with adding an occurrence.
- 25) Click the **Occurrence** tab.
- 26) Click the **Add New Occurrence** icon.

New Event Occurrence

2012 Summer Camp [6/14/2012] Events Registrations [3] Registrants [5] Security Occurrences Attendance Summary Transactions Documents

☐ Only display occurrences where check-in is currently active

Name	Attendance	Start	End	Location	Notes	Closed
There are no results to display.						

Page: 1 of 1 Page Size: 10 Refresh 0 Occurrence(s)

Generate Multiple Occurrences

- 27) Click the New Occurrence hyperlink

New Occurrence

2012 Summer Camp [6/14/2012] Events Registrations [3] Registrants [5] Security Occurrences Attendance Summary Transactions Documents

☐ Only display occurrences where check-in is currently active

Name	Attendance	Start	End	Location	Notes	Closed
New Occurrence	0	9/7/2011 12:00 AM	9/7/2011 11:59 PM	Jungle Village		Close Occurrence

Page: 1 of 1 Page Size: 10 Refresh 1 Occurrence(s)

Generate Multiple Occurrences

- 28) Click **Edit Details**.
- 29) Make the appropriate **changes** and **entries** for this occurrence. *Events listed on your Arena-managed website must have a future start date such as, the first day of the event. See Occurrences in Groups for explanation of each field.*

Edit Details

Allows an attendance occurrence to be modified

Attendance Type: Children's Check-In - Children's Events

Name: 2012 Summer Camp

Location: Jungle Village

Area:

Start Date: 07/16/2012 Time: 07:45 AM

End Date: 07/20/2012 Time: 06:00 PM

Check-In Location: Main CampusLaptop - Kids Camp

Check-In Start: Time:

Check-In End: Time:

Membership Required for Check-In: ☐

Occurrence Closed: ☐

Head Count: 0

Notes:

Update Cancel

- 30) Click **Update**.

Steps to Add a Registration to an Event Tag:


- 1) From the page of the specific Tag, click the **Registrations** tab.
- 2) Click the **Add New Registration** link to search and select an existing record.
- 3) Click the [name](#) of the registration.
- 4) Make the appropriate **entries** for this registration or add other registrants for this registration.

Registrants

Payments

Communications

Cost Details


Name	Age	Gender	Home Phone	Status	T-shirt	Cost	Applied Payments	Difference	Notes/Activity
Sample, Pete	23	M	(901) 757-2372	Connected		\$23.75	\$0.00	\$23.75	


Page: 1 of 1


Page Size: 344


Refresh

1 Registrant(s)









- **Registrants** – Use this tab to display all registrants for this single registration. You also delete existing registrants or add more registrants for this registration. *For example, to register two children by a parent, add the parent on the Registration tab which will add them as a Registrant . Then click the parent's registration. Add the children and remove the parent. Now you are ready to proceed with any other adjustments for each registrant.*
- **Payments** – Use this tab to enter payments for each registrant for this registration. *Options may vary.*
- **Communications** - Use this tab to send the registration e-mail to the registering person.
- **Cost Details** – Use this tab to display the payment details for each registrant.

Steps to Add an Existing Record to a Sub-event Tag:

- 1) Select the **Registrants** tab of the Event Tag (not Sub-Event).

The screenshot shows the 'Registrants' tab for an event tag. At the top, there are tabs for 'Best Event with Sub Events [3/5/2015] Events', 'Registrations [1]', 'Registrants [1]', 'Security', and 'Occurrences'. Below the tabs, there is a funnel icon and input fields for 'First Name' and 'Last Name'. To the right of these fields are checkboxes for 'In Process' (checked), 'Inactive' (unchecked), 'Connected' (checked), and 'New Request' (checked). Below the input fields is an 'Apply Filter' button. Below the filter section is a table with columns: 'Name', 'Age', 'Gender', 'Home Phone', and 'Registered By'. The table contains one row with the data: 'Sample, Everett', '63', 'M', '(901) 757-2372', and 'Sample, Everett'. At the bottom of the table, it says 'Page: 1 of 1', 'Page Size: 344', a 'Refresh' button, and '1 Registrant(s)'.

- 2) Select the **name** of the Registrant.
- 3) Select the **Sub-Events** for this person.

The screenshot shows the 'Sub-Events' selection window. At the top, there are tabs for 'Sub-Events', 'Custom Fields', 'Fees/Discounts', 'Status/Notes', and 'Activity'. Below the tabs, the text 'Sub-Events' is displayed, followed by the instruction 'Select which sub-events (if any) this person is attending.' Below this, the date 'Monday, March 02, 2015' is shown. Under the date, there is a checkbox next to the text '8:00 AM - 5:00 PM : Best Class in the World (\$15.00)'. At the bottom of the window, there are 'Save Changes' and 'Cancel' buttons.

- 4) **Update.**

Steps to Export Event Transactions:

- 1) From the Event Transactions tab, use the Filter fields to filter any transactions.
- 2) Click **Export GL File... button**. Any transactions that display on the screen are batched for export.

Event Transactions Tab

Winter 2009 Adult Bible Studies [1/22/2010] Events

Registrations [5] Registrants [5] Security Occurrences Attendance Summary **Transactions** Documents

From Through Transaction Detail

First Name Transaction Type

Last Name Payment Type

Payment Method

Export Status

Transaction Date	Transaction Type	Payment Type	Payment Method	Transaction Detail	Amount	Applied Amount	Registration	Registrants	Notes	Created	Exported
1/19/2010	Sale	Online Payment	Visa	10011910554019233	\$30.00	\$30.00	Addams, "Harley"	Test, Card	BR549 - Winter 2009 Adult Bible Studies AuthCode: tstat	1/19/2010 By "Harley" Addams Jr.	<input type="checkbox"/>

Page: 1 2 3 4 5 of 5 Page Size: 1 5 Transaction(s)

Total Amount: \$50.00 Total Applied: \$50.00

- 3) Enter appropriate **General Ledger information**. To use the export button, you will need to first create a General Ledger Export page using the Event General Ledger Export popup.

Arena (2009.2.100) - Windows Internet Explorer

Export General Ledger File

Description Winter 2009 Adult Bible Studies [1/22/2010]

Company #

Fund #

Journal Type

Accounting Period

Date

Bank Account #

Revenue Department #

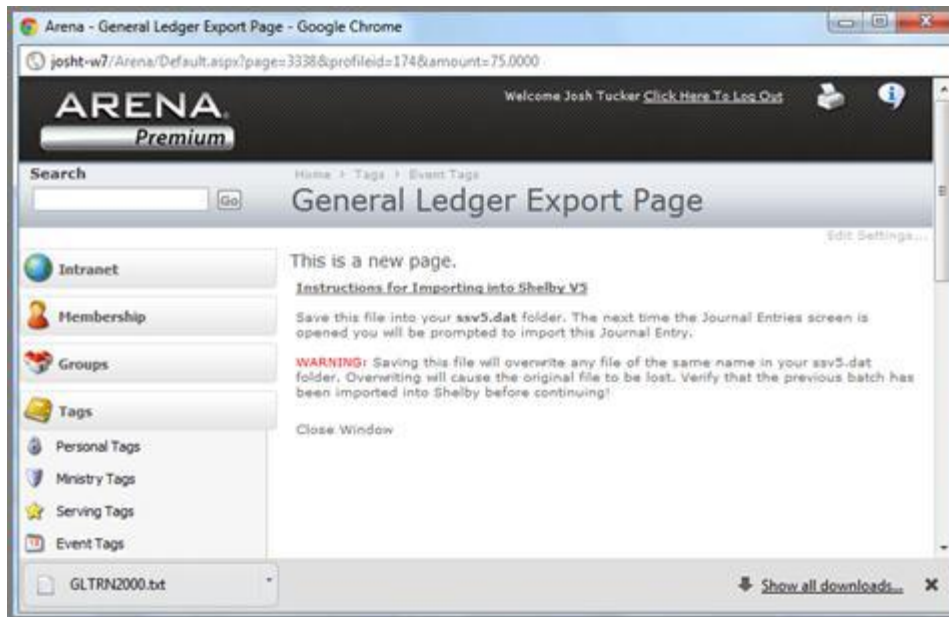
Revenue Account #

Project Code

Amount \$50.00

- 4) Click **Export**.

- 5) You are now ready to **import transactions into Shelby v.5.**



- 6) On the Event Tag Transactions tab, all exported transactions are marked as exported. *You can run the general ledger export multiple times for the same event. Use the filter to exclude previously exported transactions.*

Security Occurrences Attendance Summary Transactions Documents							
<input type="text"/> <input type="text"/> <input type="button" value="Go"/> <input type="text"/> <input type="button" value="Apply Filter"/>							
Amount	Applied Amount	Registration	Registrants	Notes	Created	Exported	
\$25.00	\$25.00	Tucker, Josh	Tucker, Josh	12345 - Test for Payment AuthCode:	2/9/2012 By Josh Tucker	✓	✗
\$50.00	\$50.00	Tucker, Josh	Tucker, Josh	12345 - Test for Payment AuthCode:	2/9/2012 By Josh Tucker	✓	✗
Applied: \$75.00 <input type="button" value="Export GL File..."/>							

- 7) Click the **Export GL File...**

- 8) From the General Ledger Export page, **complete all desired fields**.

The screenshot shows the 'General Ledger Export' form. At the top, it says 'This is a new page.' Below that is the title 'Export General Ledger File'. The form contains the following fields and values:

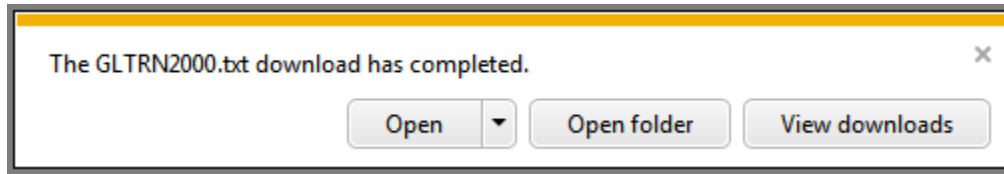
Field	Value
Description	Back to School Outing [7/5/2012]
Company #	001
Fund #	789
Journal Type	Journal Entry
Accounting Period	03
Date	8/7/2012
Bank Account #	84000026
Revenue Department #	123
Revenue Account #	78458745
Project Code	
Amount	\$110.00

At the bottom of the form, there is a copyright notice: '© Copyright 2010 Shelby Systems, Inc.' and an 'Export' button.

- 9) Click **Export**.
- 10) **Save the GLTRN200.txt file** in the ssv5.dat folder.

The screenshot shows the 'General Ledger Export' page in the Arena Premium application. The page header indicates the user is logged in as 'The Wife Johnson' and provides a link to 'Click here to log out'. The page title is 'General Ledger Export' with an 'Edit Settings...' link. Below the title, it says 'This is a new page.' and 'Instructions for Importing into Shelby V5'. The instructions state: 'Save this file into your ssv5.dat folder. The next time the Journal Entries screen is opened you will be prompted to import this Journal Entry.' A warning message follows: 'WARNING: Saving this file will overwrite any file of the same name in your ssv5.dat folder. Overwriting will cause the original file to be lost. Verify that the previous batch has been imported into Shelby before continuing!'. There is a 'Close Window' button and a copyright notice: '© Copyright 2010 Shelby Systems, Inc.'. A file save dialog is open at the bottom, asking: 'Do you want to open or save GLTRN2000.txt (213 bytes) from lindajw7nb?'. The dialog has 'Open', 'Save', and 'Cancel' buttons.

- 11) The below **confirmation window** will display and you are ready to import the GLTRN200.txt file into Shelby v.5.



Steps to Manually add a Payment for a Registrant:


- 1) Go to the **Registration tab** for this Event.

Event Registrations



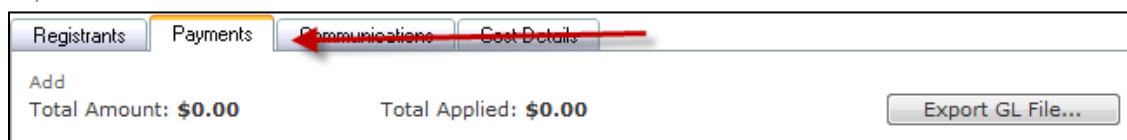
- 2) Click the [name](#) of the person to whom you want to make a manual payment.

Registration



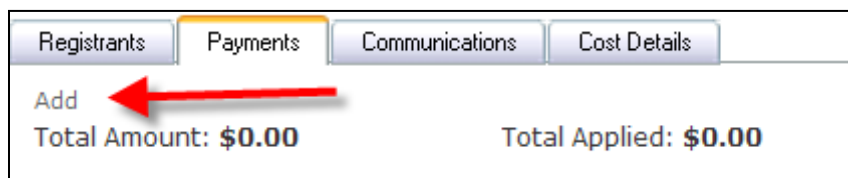
- 3) Click the **Payments tab**.

Payments Tab



- 4) Click **Add** link.

Add Payment



- 5) Enter appropriate **payment information**.

- 7) Select which **payment** the amount should be applied.

Event Payments

Registrants

Payments

Communications

Cost Details

Transaction Details:

Transaction Type

Manual

Transaction Date

11/29/2009

Payment Type

Full Payment

Payment Method

Cash

Amount

12.00

Transaction Detail

detail

Post Transaction

☒

Apply To:

Jon Doe

1/15/2010 6:00 PM - 8:30 PM : Welcome Dinner

☒ Price per adult - \$12.00

Applied: \$12.00

Remaining: \$0.00

Notes

Update

Cancel



Post Transaction posts the transaction to the payment processor, if you make the payment manually.

- 8) Click **Update**.

Steps to Update Event Tag Registrants, if not using sub-events:

- 1) From the **Event Registrant tab**, click the [name](#).

Event Registrant Details

Custom Fields	Fees/Discounts	Status/Notes	Activity
Status/Notes Update the status to reflect this registrant's current status in this event. You can also enter any notes about			
Status		Connected <input type="button" value="v"/>	
Notes			
<input type="text"/>			

- 2) Make **changes**, as desired for the registrant.

Steps to Apply a Refund

You can apply refund to exported transactions.

- 1) Go to the desired **Event Tag**.
- 2) Select the **Registration Tab**.

Event Registrations

2008 Back to School Outing [1/5/2008] Events	Registrations [81]	Registrants [79]	Security	Occurrences	Attendance Summary
Add					
<u>Registered By</u>	<u>Registrants</u>	<u>Total Cost</u>	<u>Total Payments</u>	<u>Applied Payments</u>	<u>Remaining Balance</u>
Aqard, Rebecca	1	\$50.00	\$90.00	\$40.00	\$10.00
Aqard, Susie	1	\$25.00	\$25.00	\$0.00	\$25.00

- 3) Select the **Registration** of whom you would like to apply a refund.

Event Registrations

2008 Back to School Outing [1/5/2008] Events	Registrations [81]	Registrants [79]	Security	Occurrences	Attendance Summary
Add					
<u>Registered By</u>	<u>Registrants</u>	<u>Total Cost</u>	<u>Total Payments</u>	<u>Applied Payments</u>	<u>Remaining Balance</u>
Aqard, Rebecca	1	\$50.00	\$90.00	\$40.00	\$10.00
Aqard, Susie	1	\$25.00	\$25.00	\$0.00	\$25.00

- 4) Select the **Payments** tab.

Event Registration

Event Registration

Registration Details:

Registered By [Linda Johnson](#) [Change...](#) **Total Cost** \$55.00
Created 11/9/2010 3:26 PM **Total Paid** \$55.00
Balance \$0.00

RSVP Members Payments Communications

Transaction Date	Transaction Type	Payment Type	Payment Method	Transaction Detail	Amount	Applied Amount	Notes	Created	Exported
11/9/2010	Sale	Online Payment	E-Check	101109152702HSR	\$55.00	\$55.00	123456 - 2011 Summer Camp AuthCode:	11/9/2010 By Linda Johnson	

Page: 1 of 1 Page Size: 139 Refresh 1 Transaction(s)

Total Amount: \$55.00 Total Applied: \$55.00 Export GL File...

- 5) Select the **Transaction Date**.

Transaction Date

Event Registration

Registration Details:

Registered By [Linda Johnson](#) [Change...](#) **Total Cost** \$55.00
Created 11/9/2010 3:26 PM **Total Paid** \$55.00
Balance \$0.00

RSVP Members Payments Communications

Transaction Date	Transaction Type	Payment Type	Payment Method	Transaction Detail	Amount	Applied Amount	Notes	Created	Exported
11/9/2010	Sale	Online Payment	E-Check	101109152702HSR	\$55.00	\$55.00	123456 - 2011 Summer Camp AuthCode:	11/9/2010 By Linda Johnson	

Page: 1 of 1 Page Size: 139 Refresh 1 Transaction(s)

Total Amount: \$55.00 Total Applied: \$55.00 Export GL File...

6) Select Refund.

Event Refund

RSVP Members Payments Communications

Transaction Details:
Transaction Type: Sale
Transaction Date: 11/9/2010
Payment Type: Online Payment
Payment Method: E-Check
Amount: 55.00
Transaction Detail: 101109152702HSR

Apply To:
RSVP Members
☒ Full Payment - \$55.00
☐ (PAID) Fee - \$0.00

Applied:
Remaining:

Notes
123456 - 2011 Summer Camp AuthCode:

Update Cancel Refund

7) Click **OK** to confirm the Refund.

Refund Confirmation

Message from webpage

Are you sure you want to refund this transaction? Click Ok to Continue.



OK Cancel

Refund confirmation message

RSVP Members

Payments



Communications

Transaction Date	Transaction Type	Payment Type	Payment Method	Transaction Detail	Amount	Applied Amount	Notes	Created	Exported
11/9/2010	Refund		E-Check	101109154141VRB	(\$55.00)	(\$55.00)		11/9/2010 By Linda Johnson	
11/9/2010	Sale	Online Payment	E-Check	101109152702HSR	\$55.00	\$55.00	123456 - 2011 Summer Camp AuthCode:	11/9/2010 By Linda Johnson	

Page: 1 of 1

Page Size:

2 Transaction(s)

Total Amount: \$0.00

Total Applied: \$0.00

Refund on Payments Tab

Remaining:

The refund has been processed but the confirmation message was not sent successfully!

Notes

123456 - 2011 Summer Camp AuthCode:



- You cannot delete Registrations with applied payments.
- You can process multiple refunds.

Steps to Resend an E-mail to a Registrant

- 1) Select the Registration tab of the Event Tag.
- 2) Select the name of the Registration.
- 3) Select the Communications tab.
- 4) Click the Resend button.

Resend Event Email

Registration Details:
Registered By [Marie Sample](#) [Change...](#)
Created 6/20/2011 6:59 PM
Total Cost \$260.00
Total Paid \$40.00
Balance \$220.00

[Registrants](#) [Payments](#) [Communications](#) [Cost Details](#)

Communications
Enter the email address that all communication specific to this event should be sent to. You can also resend a confirmation or reminder, and view any eTickets if any of these options are enabled for the event.
Communication Email [Save](#)
Registration Confirmation [Send](#)
Confirmation was sent successfully



Volunteer Tracking

Arena's Volunteer Tracking provides the tools to monitor and maintain your entire volunteer ministry. Arena assigns volunteers to a serving tag according to their preferences by using the Add a Volunteer page and a Serving Opportunities tool available on your Arena-managed website. You can directly assign volunteers to a specific position by adding their name to a Serving Tag. You can also view all of your volunteers, regardless of the serving tag, under the Administration area of Volunteer Tracking.

Add Volunteer

Use the Add a Volunteer page to add a person, according to their serving preferences. Adding a person through this page will place him or her in a serving tag with a pending status.

Steps to Add a Volunteer:

- 1) Click on Volunteer Tracking → Add Volunteer.
- 2) In the Persons area, click the **Add...** link to search and select for an existing record.

Add a Volunteer

Add a new volunteer.

Individuals: [Bill Sample](#) [Add...](#) [Clear All](#)

Source: Word of Mouth

Ministries: Guest Service Volunteers [Choose...](#)

Comments: would like to know more

- 3) Select the **Source** of the volunteer by using the drop-down list, for example: Contact Card, Phone Call, or Web Response.
- 4) Click the [Choose...](#) link to select the Serving tag(s) of interest.
- 5) Enter **comments**, as desired.
- 6) Click **Add**. *When you submit the request, Arena places the volunteer on the selected Serving Tag(s) with a "Pending" status. Then you can view the record in the Volunteer Tracking → Volunteer Administration area. The process is complete when someone at the organization contacts this potential volunteer and then updates the record as shown in Administration below. Your Arena Administrator can configure e-mails to send to people responsible for these positions.*

Serving Tags

The Volunteer Tracking → Serving Tags link is a redirect to the Tags → Serving Tags area. See Chapter 4 – Tags for more information on Serving Tags.

Volunteer Administration

The Administration page displays information needed to process Volunteers and place them in a specific Serving Tag or status.

Volunteer Administration

Due	Leader	Serving Tags	Age	Gender	Email	Home Phone	Last Modified	Date Active	Date Dormant	Notes/Activity
<input type="checkbox"/>	Flintstone, Fred	11:15am Service-1st Sunday	39	M	fred@bedrock.net	(901) 757-1212	2/27/2009	2/27/2009		Member added to '11:15am Service-1st Sunday' as 'Connected'.
<input type="checkbox"/>	Tester, John	11:15am Service-1st Sunday	34	M	jttester@gmail.com	(901) 789-4561	6/15/2009			Member added to '11:15am Service-1st Sunday' as 'No Contact'.
<input type="checkbox"/>	Flintstone, Fred	11:15am Service-2nd Sunday	39	M	fred@bedrock.net	(901) 757-1212	2/27/2009	2/27/2009		Member added to '11:15am Service-2nd Sunday' as 'Connected'.

Steps to Update a Volunteer:

- 1) Under **Volunteer Tracking → Administration**, select the record you wish to edit by clicking the person's name. This page will display the relevant Personal Information, Contact Information, Address Information, the dates associated with this Volunteer application, the Serving Tag details and any notes added during its creation. This page also lists all of the person's activities such as joining or leaving a Service Tag.
- 2) To make changes to this record, click the Edit link to open the Serving Tag Details area as shown below. On this page you can edit the person's Source, Status within the tag, the Reason for this status, the number of Hours per Week he is active in this tag, indicate if he has met all Prerequisites for this tag, change his Serving Tag membership using the Move To drop-down, and add serving Notes. After completing this page, click the Save link to save the entry.

Serving Tag Details

Source: Info Center

Status: In Process Reason:

(*)- Requires a reason If placing elsewhere, be sure to include the name of the new ministry.

Hours/Week: 1.00

Prerequisites: ☐ Has this person met all of the prerequisites for Door Greeter?

Move To: --Door Greeter




Notes: New Greeter volunteer

Save Cancel

Status Flag

The colored flag next to a Serving Tag registrant name indicates the registrant's status. Note that only members who are under the In Process or No Contact status will show one of these flags.

Status Flags

Status	Description
 - Green	Record has been modified in the last week.
 - Yellow	Record has not been modified in over a week.
 - Red	Record has not been modified in over 4 weeks.



Promotions

Promotions are upcoming events or announcements that Arena users want published, on your organization's Arena-managed website, as an entry within your organization's bulletin, or on your organization's newsletter or E-zine. Your Arena Administrator can implement an approval process so that supervisors have to approve requests made by Arena users before publication.



For more information on the setup of your website, and/or HTML newsletters, please refer to the Arena Administrator manual.

New Promotion Request

The New Promotion Request page is used to submit promotions and their details for review by an administrator or director, who will approve it for use in your organization's Arena-managed website, organization bulletin, or newsletter/E-zine.

Steps to Submit a New Promotion Request:

- 1) Go to **Promotions** → **New Promotion Request**, as shown below.
- 2) Complete all **applicable fields**.

New Promotion Request

The screenshot shows the 'New Promotion Request' form with the following fields and options:

- Title:** Text input field.
- Priority:** Text input field with value '99' and a range '(0 - 99)'.
- Contact Name:** Text input field with value 'Jon Doe' and a 'Change...' link.
- Contact Phone:** Text input field.
- Contact Email:** Text input field with value 'Jon.Doe@yourchurch.com'.
- Event:** Dropdown menu with 'None' selected and a 'view' button.
- Primary Ministry:** Dropdown menu with '-- Select Topic Area --'.
- Alternate Ministries:** A grid of checkboxes for various ministries:

<input type="checkbox"/> Adult	<input type="checkbox"/> Jr. High	<input type="checkbox"/> Programming
<input type="checkbox"/> All Church	<input type="checkbox"/> Media	<input type="checkbox"/> Senior Adults
<input type="checkbox"/> Baptisms	<input type="checkbox"/> For Members	<input type="checkbox"/> Single's
<input type="checkbox"/> Bookstore	<input type="checkbox"/> Memorial Service	<input type="checkbox"/> Small Groups
<input type="checkbox"/> Cafe	<input type="checkbox"/> For Visitors	<input type="checkbox"/> Sports
<input type="checkbox"/> Coffee Bar	<input type="checkbox"/> Men's	<input type="checkbox"/> Sunday Seminars
<input type="checkbox"/> College	<input type="checkbox"/> Missions	<input type="checkbox"/> Weddings
<input type="checkbox"/> Communications / IT	<input type="checkbox"/> Nursery	<input type="checkbox"/> Women's
<input type="checkbox"/> Elementary	<input type="checkbox"/> Office of the Senior Pastor	<input type="checkbox"/> Youth Sports
<input type="checkbox"/> Events Page	<input type="checkbox"/> Operations	<input type="checkbox"/> Volunteering
<input type="checkbox"/> Finance and Administration	<input type="checkbox"/> Personal Ministry	<input type="checkbox"/> Pre-Marital
<input type="checkbox"/> Fitness	<input type="checkbox"/> Prayer	<input type="checkbox"/> Homeschool
<input type="checkbox"/> High School	<input type="checkbox"/> Preschool	
- Promote on Web:** Check box.
- Approved:** Check box.
- From:** Text input field.
- To:** Text input field.
- Web Summary:** Text area.
- Summary Image:** Text input field.

- **Title** – Enter a title for this promotion such as brief description of the event or a tagline for the event.
 - **Priority** – The Priority determines which promotions to display on the Arena-managed web site and in what order, on a scale of 0 to 99 (0-99 is lowest to highest).
 - **Contact Name, Phone and Email** – Click the [Change...](#) link to select from existing records or enter the values for each field. *If using with an Event Tag, this will typically be the same as the Event contact for an Event Tag.*
 - **Event** – If this is a promotion for a specific Event Tag, select the Event from the drop-down list. If this is not an Event Tag promotion, leave this set to **none**. *To view the details of an Event Tag, click the **View** button to select from all active Event Tags. Event Tags can be associated with one Promotion.*
 - **Primary Ministry** – Select a Primary Ministry for this event from the drop-down to determine where to display the promotion of your Arena-managed website.
 - **Alternate Ministry** – If applicable, select alternate ministries to determine additional areas to display the promotion of your Arena-managed website. *The Primary Ministry will indicate the primary instance of the promotions module/control on your organization's Arena-managed webpage that this promotion will display on, while Alternate Ministries will indicate any other instances of the promotions module/control that will display this promotion if there is an empty spot available.*
 - **Priority** – Use this field to manage the display order on the website.
- 3) Select the **Web tab**.
 - a) Check the **Promote on Web** checkbox to promote on your Arena-managed website.
 - b) Enter promotion **Date Range**.
 - c) Enter **Web Summary** to display a brief description on the thumbnail display on your Arena-managed Website, on the “Get More Info” link on the web promotion.
 - d) If desired, use the **External Link** field if you are using a third party for your registrations.
 - 4) Select the **Bulletin tab**.
 - a) Select a **bulletin date** for your promotion.
 - b) Enter a **summary** for the event.
 - c) Select applicable **options**.
 - 5) Select the **Newsletter tab**.
 - a) Check the **Promote on Newsletter** checkbox.
 - b) Enter a **date range**.
 - c) Check **Use Web Summary**, if applicable, or enter the newsletter summary.
 - 6) Click the **Save** button to save the event promotion request.

Public Calendar

The Public Calendar page, as shown below, displays all up-coming or on-going Promotions, according to their dates, which is useful as a quick reference for the approval process.

Use the filters at the top of the page to display the desired items. The list will display the First Occurrence, Last Occurrence, Tier Level, Ministry (Topic Area), Details, Approved, and Priority. The Details column will list the Promotions with the title as a link to the Promotion page. Click the Save Changes button to save any changes in the Approved or Priority columns.

Public Calendar

Public Calendar

Edit Settings

View the events for the public calendar.

Approved

All

Contact Name

Expired

☒ Include Expired

Apply Filter

Ministry

All

Alternate Ministry

☐ Adult
 ☐ Jr. High
 ☐ Programming

☐ All Church
 ☐ Media
 ☐ Senior Adults

☐ Baptisms
 ☐ For Members
 ☐ Single's

☐ Bookstore
 ☐ Memorial Service
 ☐ Small Groups

☐ Cafe
 ☐ For Visitors
 ☐ Sports

☐ Coffee Bar
 ☐ Men's
 ☐ Sunday Seminars

☐ College
 ☐ Missions
 ☐ Weddings

☐ Communications / IT
 ☐ Nursery
 ☐ Women's

☐ Elementary
 ☐ Office of the Senior Pastor
 ☐ Youth Sports

☐ Events Page
 ☐ Operations
 ☐ Volunteering

☐ Finance and Administration
 ☐ Personal Ministry
 ☐ Pre-Marital

☐ Fitness
 ☐ Prayer
 ☐ Homeschool

☐ High School
 ☐ Preschool

First Occurrence	Last Occurrence	Tier Level	Ministry	Details	Approved	Priority
Thu, Mar 05, 2015	Tue, Mar 10, 2015	All	Church	Title: Best Event with Sub Events Summary: Event Summary Details: Event Details Alternate Ministries: All Church Contact Info: Linda Johnson (901) 757-2372 Linda.Johnson@arenachms.com Created By: The Wife Johnson (10/23/2011 4:13 PM) Last Modified By: The Wife Johnson (11/3/2011 12:28 PM)	<input checked="" type="checkbox"/>	99
Sun, Mar 01, 2015	Sun, Mar 01, 2015	All	Church	Title: Women's Retreat and Conference with Sub Events Summary: Come join the women of Passage for a fulfilling time with other christian women. Details: This retreat will not only inspire you but, provide the opportunity to inspire others. Alternate Ministries: All Church Contact Info: Jane Sample 901-757-2372 Linda.Johnson@arenachms.com Created By: The Wife Johnson (10/9/2010 9:09 AM) Last Modified By: The Wife Johnson (11/3/2011 12:25 PM)	<input checked="" type="checkbox"/>	99

Web Requests

The Web Request page, shown below, displays all Promotions entered with the Promote on Web option selected on the Web tab. This is a quick reference for approval of all web promotions.

Use the filters at the top of the page to display the desired items. Web requests display below the filters with the relevant information. The Web Request page displays Starting and Ending Dates, Area, Details, Home Page option, Approval Status and Priority. Click the title link to open the entry. Click the Save Changes button to save changes to the Approved or Priority columns.

Web Requests

Web Requests
Web Promotion Requests

Home > Promotions > Web Requests Print This Page

Approved **Area**

Contact Name

Expired ☐ Include Expired Apply Filter

Cross-Promote

<input type="checkbox"/> Adult	<input type="checkbox"/> Jr. High	<input type="checkbox"/> Programming
<input type="checkbox"/> All Church	<input type="checkbox"/> Media	<input type="checkbox"/> Senior Adults
<input type="checkbox"/> Baptisms	<input type="checkbox"/> For Members	<input type="checkbox"/> Single's
<input type="checkbox"/> Bookstore	<input type="checkbox"/> Memorial Service	<input type="checkbox"/> Small Groups
<input type="checkbox"/> Cafe	<input type="checkbox"/> For Visitors	<input type="checkbox"/> Sports
<input type="checkbox"/> Coffee Bar	<input type="checkbox"/> Men's	<input type="checkbox"/> Sunday Seminars
<input type="checkbox"/> College	<input type="checkbox"/> Missions	<input type="checkbox"/> Weddings
<input type="checkbox"/> Communications / IT	<input type="checkbox"/> Nursery	<input type="checkbox"/> Women's
<input type="checkbox"/> Elementary	<input type="checkbox"/> Office of the Senior Pastor	<input type="checkbox"/> Youth Sports
<input type="checkbox"/> Events Page	<input type="checkbox"/> Operations	<input type="checkbox"/> Volunteering
<input type="checkbox"/> Finance and Administration	<input type="checkbox"/> Personal Ministry	<input type="checkbox"/> Pre-Marital
<input type="checkbox"/> Fitness	<input type="checkbox"/> Prayer	<input type="checkbox"/> Homeschool
<input type="checkbox"/> High School	<input type="checkbox"/> Preschool	

Start Date	End Date	Area	Details	Approved	Priority
Fri, Oct 05	Fri, Oct 12	All Church	<p>Title: Couples Bowling Night</p> <p>Summary: Come fellowship with us at Brunswick Bowling Lanes on Friday, October 12th, from 6:00pm till 10:00pm. Shoe rental is just \$5 for the night, and we've reserved 6 lanes.</p> <p>Details:</p> <p>Cross-Promote: College, Senior Adults, Adult, All Church</p> <p>Contact Info: Jon Doe (901) 555-1234 Jon.Doe@yourchurch.com</p> <p>Created By: Jon Doe (10/04/07 12:52:45 P)</p> <p>Last Modified By: Jon Doe (10/04/07 12:57:47 P)</p>	<input checked="" type="checkbox"/>	99

Bulletin Requests

The Bulletin Requests page, as shown below, displays all Promotions entered with a Bulletin request item on the Bulletin tab. You can use this page as a quick reference for approval of all Bulletin Requests.

Your publishing staff should use this page to see what promotions should be included on a bulletin, as Arena does not publish a bulletin itself. Note that this view will only show Requests for publishing dates that have not occurred yet. To view previous Bulletin Requests you will need to open the person promotion itself under Promotions → All Promotion Requests.

Use the filters at the top of the page to display the desired items. The columns displayed on this page include Date, Area, Details, Approval Status, Priority and Published status. You can click the title link to open the entry. Click the Save Changes button to save your changes to the Approved, Priority, and Published columns.

Bulletin Requests

Bulletin Requests
Promote an event or ministry in the bulletin.

Home > Promotions > Bulletin Requests

Filters:

- Date:** 10/07/07
- Area:** All
- Approved:** All
- Published:** All
- Contact Name:**
- Apply Filter**

Date	Area	Details
10/07/07	All Church	<p>Title: Couples Bowling Night</p> <p>Summary: Come fellowship with us at Brunswick Bowling Lanes on Friday, October 12th, from reserved 6 lanes.</p> <p>Contact Info: Jon Doe (901) 555-1234 Jon.Doe@yourchurch.com</p> <p>Created By: Jon Doe (10/04/07 12:52:45 P)</p> <p>Last Modified By: Jon Doe (10/04/07 12:57:47 P)</p> <p>Options: Child Care, Online Registration, Event Table</p>

Newsletter Promotions

The Newsletter Promotions page, as shown below, displays all Promotions entered on the Newsletter tab. You can use this page as a quick reference for approval of all Newsletter Requests. Your publishing staff should use this page to see what promotions to add to the printed newsletter, as Arena does not publish a newsletter itself. Use the filters at the top of the page to display the desired items. The columns displayed on this page include Starting and Ending Dates, Area, Details, Approval Status and Priority. Click the title link to open the entry. Click the Save Changes button to save changes to the Approved or Priority columns.

Newsletter Promotions



Newsletter Promotions

Promote an event or ministry in the newsletter.

Home > Promotions > Newsletter Promotions





Approved
Area

Contact Name

Expired ☐ Include Expired

Start Date	End Date	Area	Details
Fri, Oct 05	Fri, Oct 12	All Church	Title: Couples Bowling Night Summary: Come fellowship with us at Brunswick Bowling Lanes on Friday, O we've reserved 6 lanes. Contact Info: Jon Doe (901) 555-1234 Jon.Doe@yourchurch.com Created By: Jon Doe (10/04/07 12:52:45 P) Last Modified By: Jon Doe (10/04/07 12:57:47 P)

All Promotion Requests

The All Promotion Requests page, as shown below, provides an overview of all Promotions. This is a reference point for all promotions and is where you can delete outdated promotions from the system. Clicking on the title link for a promotion opens it for maintenance or approval. You can add Promotions by selecting the Add New Promotion  icon or clicking the Add link in the Filter area, or remove it by selecting the Delete  icon in the appropriate row.

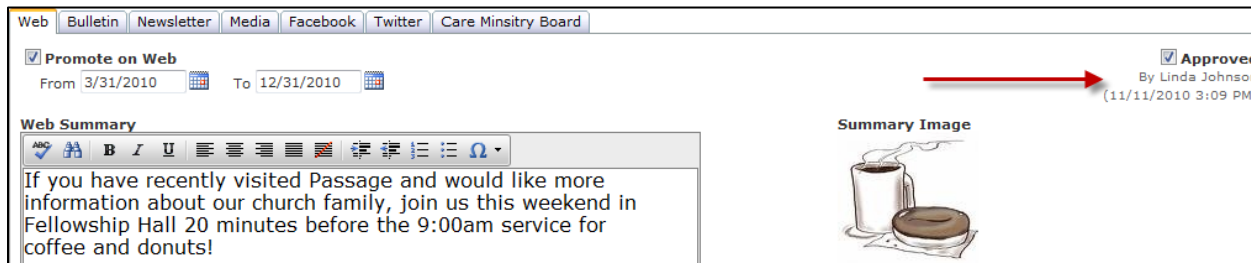
All Promotion Requests



Promotion Approvals

When promotions you approve promotions, Arena will stamp the promotion with the name of the current approver, the date and time of the approval.

Promotion Approval





Sports

You can use the Sports section to create, manage, and track the various Athletic Teams managed by your organization. Arena has the ability to organize Teams by Division, League, or any other form of categorization necessary. For ease of use, Sports is structured the same as Groups, in that it uses various Levels in a Parent to Child relationship to define Tree Structure (or, in this case, Team Structure), but with some differences in terminology. The Sports section also allows for tracking of Games and Scores, Play Schedules, Seasons, Team Rosters, Players and Coaches, and Team Statistics. You can maintain the various Sport Groups under the Clubs tab in Navigation.

Clubs

Clubs is where the structure is set for the Sport Teams. Adding and maintaining the Levels in the Sport Group Trees is the same as Small Groups. Typically, the largest difference will be in the field names, since these relate to Sport topics.



Please refer to the Groups section of this manual for help with Group Trees and Small Groups (Teams).





Schedule

Clicking on the Schedule link will display the Game List, as shown below. Field locations, game dates, and game times display in this list. *Use the drop-down list filters at the top of the page, to filter by season, date, division or team.*



Schedule List

Games:							
Season: Stars 2005-2006		Date: -- All --					
Division: Softball:Flight A - Div 1							
Team: Hank's Homers							
Date	Time	Location	Home Team	Score	Visitor Team	Score	Status
07/18/06	6:00 PM	Field 1	Steve's Swatters	5	Hank's Homers	4	Completed
07/11/06	6:00 PM	Field 1	Steve's Swatters	6	Hank's Homers	8	Completed
07/13/06	6:00 PM	Field 1	Hank's Homers	1	Steve's Swatters	0	Completed
07/18/06	12:00 PM	Field 1	Hank's Homers	2	Steve's Swatters	3	Completed
07/25/06	12:00 PM	Field 1	Hank's Homers		Steve's Swatters		Future Game
07/27/06	12:00 PM	Field 1	Steve's Swatters		Hank's Homers		Future Game
08/01/06	12:00 PM	Field 1	Hank's Homers		Steve's Swatters		Future Game
08/03/06	12:00 PM	Field 1	Steve's Swatters		Hank's Homers		Future Game
Pages: 1 of 1 Page Size: 20 Refresh 8 Game(s)							

Steps to Add a Game:

- 1) Click the New Game  icon to add a future game (or a past game). The page will refresh with a new entry at the bottom of the list.
- 2) Enter the date, time, choose the Location, Home Team, Score, Visiting Team, Visiting Team score, and the Status of the game. The status allows you to create games that have not occurred yet.
- 3) Click Update  to save, Cancel  to go back without saving, or Delete  to remove this game.

Steps to Edit a Game:

- 1) To edit a game, click the Edit Game  icon next to the desired game.
- 2) Using the drop-down lists, choose the appropriate values for this game.
- 3) Click the Update  icon to save the updated information.

Reports

The Reports area has identical functionality to the Reports in Membership.



See Reports in under the **Membership** section of this manual for information on using custom reports and the **Reports** section of the *Arena Reference Guide* for information on creating and deploying custom reports, or visit <http://community.arenachms.com/> for more information.



Communications

Use the pages in this section to send email communications, access previous emails, and create communication templates. Optionally, you can send SMS communications, manage thresholds,



Global Threshold is available to require approvals for e-mail and SMS communications.
See your Arena Administrator for more information.

New Communication

Steps to Create a New Communication:

- 1) Go to **Communications**→ **New Communication**.
- 2) Click on the [Add...](#) hyperlink to add recipients. *This will open the Pop-up Person Search window to search and select current records.*
- 3) Select a **Template**, if available. *See Templates in this manual for more information.*
- 4) In the **From** and **From Email** fields, enter applicable information if different from the current user.
- 5) Enter **Reply to Email** address, if different from the current user.
- 6) Click **Attachments** to add files to this communication. *This brings up a pop-up window that allows you to browse and attach as many files as you choose. Click the **Close** button once you attach all the files.*
- 7) Leaving the **Add to History** box selected to add this communication to the Person Detail history section of each recipient.

New Communication

New E-mail Communication

Use this form to send an email to the individual(s) that you have selected.

To [Add...](#) [Clear All](#)

Template

From

From Email

Reply To Email

Subject

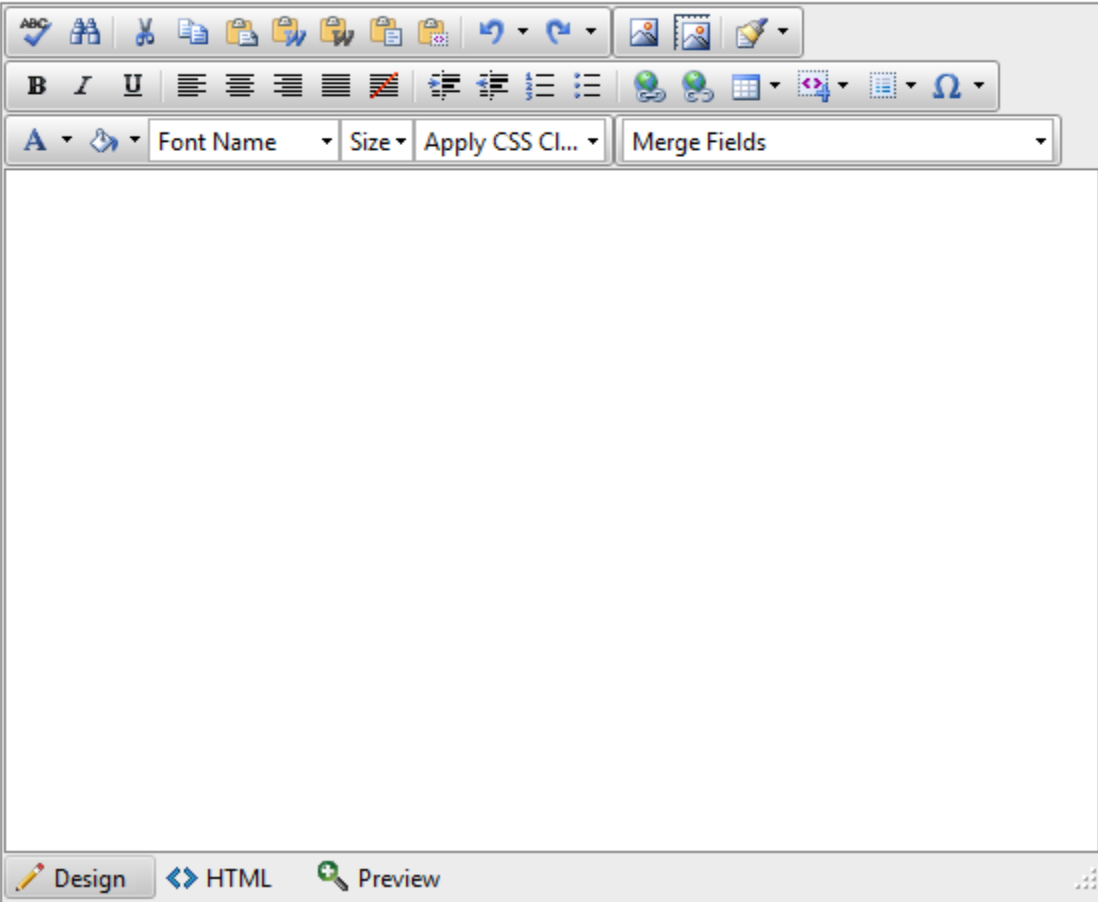
Add To History ☒

- 8) Type your e-mail message in this window. Your e-mail will display to the recipient in the same format that you enter it here. To use the available Merge Fields you can either copy/paste the fields from the Merge Fields section above the HTML window or use the Merge Fields drop-down in the HTML window.

Editor Window

Merge Fields [show](#)

HTML Message
Use this HTML editor to format your email message.



Design HTML Preview

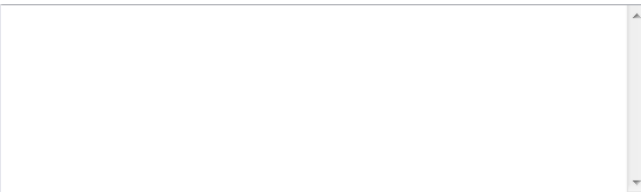


Use the ##NickName## merge field code will use the Nick Name, if available, or First Name if no Nick Name is available.

- 9) Beneath the HTML Message window, a Text Message box is where you can enter the same message in Plain Text format for those receipts who receive plain text emails.


Text Message

Text Message
Some email applications do not support email messages that are formatted as an HTML message. Use this text area to enter the message that you would like people to receive when they cannot view your HTML message above. If you leave this area blank, the system will attempt to strip the HTML code from your message above when sending to text-only email clients.



10) Once you are ready to send, select the appropriate option.

E-mail Options

Send Option
 When would you like this email to be sent?
☒ Now
☐ In the Future:  Time:
☐ **Check here if this is a bulk email message.**

- **Now** – Click this button to send the e-mail to all recipients for whom you have e-mail addresses.
- **In the future** – Click this button to schedule delivery of this e-mail for a future date and time.
- **Check here if this is a bulk email message** – Select this box to provide recipient the option to unsubscribe to emails.
- **Send Test** – Click this button to send the e-mail to the e-mail address in the “From Email” field.
- **Save as Draft** – Click this button save the e-mail for later access on the previous page.

When sending an e-mail or SMS communication, if a recipient does not have an active email or identified SMS-enabled phone number on his or her record, Arena will display the below window. From this window, you can merge those names with an available Word document, such as labels.

Word Merge Option for E-mail and SMS Communications

Send Bulk Emails
 Your communication has been saved for a future send, you can retrieve it by locating it in previous communications.
Note: Due to the number of recipients, there may be a delay in sending this message.
Note: The following people do not have a valid email address, but do have a street address on file. Would you like to print mailing labels for them?

Name	Address	City	State	Postal Code
Doe, Susan	51 Germantown Court, Round the Way and Around the Corner	Cordova	TN	38018-4269
Doe, Fred	51 Germantown Court, Round the Way and Around the Corner	Cordova	TN	38018-4269

Page: 1 of 1 Page Size: 2 Person(s)

Steps for Sending SMS via E-mail (optional):

- 1) Enter the 10-digit phone number (found on the Individual Information tab of Person's Detail page), select the **provider** from the Person Detail page.

SMS from the Person Detail Page

Cell: (901) 757-2372 ext. [] Unlisted [] SMS ☒

Personal: []

FAX: []

Verizon

[Choose SMS Provider]

Alaska Communications Systems

Alltel Wireless

- 2) You can now select the SMS icon from the Person Detail Page of the **grid results** in a List, Group, Tag or Mission Trip.

Person Detail SMS

Phones Edit

Main/Home/Primary: (901) 757-2372

Cell: (901) 757-2372


Grid Results

-	-	-
-	-	-
-	-	stucker57@aol.com

Icons: [] [] [] [SMS] [] []

- 3) Now you are ready to enter your **message** in the SMS Message box.

New Communication

To  Sample, Jane

From

From Email


Add To History ☒

Merge Fields [hide](#)
The following merge fields are available to be used in the subject and message areas of your SMS.
receives your SMS:
##FirstName##, ##NickName##, ##LastName##

Text Message
SMS text delivered via email might be split into multiple messages if the contents exceed 160 characters
include the sender. E.g., "From: John Doe".

this is a sample SMS|

20


Send Option
When would you like this email to be sent?
☒ Now
☐ In the Future:  Time:

The counter will show how many characters have been entered, although the number of characters are not limited due to some cell providers sending multiple texts if 160 characters are exceeded.

Previous

Click on **Communications → Previous** to view the content, history, and status of previously sent e-mails. This will display the previously sent e-mails of the current user login by default, but will display all users' previously sent e-mails by checking the **Show Everybody's Communications** checkbox. From this view you can see the Date the e-mail was created, who Created the e-mail, the Sender's Name, the Sender's E-mail address, the Subject, the Medium used (SMS, E-mail, or Mail), Recipients and Successful e-mails.

Previous Communications

Previous Communications:						<input type="checkbox"/> Show Everybody's Communications		
Date	Created By	Sender's Name	Sender's Email	Subject	Medium	Recipients	Successful	
6/24/2009 4:00:33 PM	linda.j	Linda Johnson	linda.johnson@arenachms.com		Mail	1		✖
6/24/2009 4:00:32 PM	linda.j	Linda Johnson	linda.johnson@arenachms.com	Final test for today--NO NEED TO RESPOND	Email	7	1	✖
6/24/2009 3:56:47 PM	linda.j	Jane Sample	linda.johnson@arenachms.com		Mail	1		✖
5/27/2009 12:56:21 PM	linda.j	Linda Johnson	linda.johnson@arenachms.com	test email	Email	1	1	✖
3/4/2009 3:04:09 PM	 Linda.J	Linda Johnson	linda.johnson@arenachms.com	Change of Plans for 1st Sunday Coneheads	Email			✖
1/9/2009 3:07:45 PM	Linda.J	Linda Johnson	linda.johnson@arenachms.com	Test email template	Email			✖
7/2/2008 2:46:10 PM	Linda.J	Linda Johnson	linda.johnson@arenachms.com	Hello from Passage	Email	9	7	✖



When you send e-mails to addresses that are no longer valid, Arena sends a "bounce back" e-mail message to the sender. If your Arena E-mail Cleanup agent is running then Arena can process this message by inactivating the person's rejected address and placing a note on the address that it is invalid.

E-mail Templates

E-mail Templates are for use in the Communications area of the internal application. Create e-mail templates for bulk e-mails you send on a regular basis and needs quickly accessed.


Steps to Create a New E-mail Template:

You can create new e-mail templates from within the Communications area of the navigation.

- 1) Go to **Communications→Templates**
- 2) Click the **Add New (Template)**  icon.
- 3) Complete all **applicable fields**.

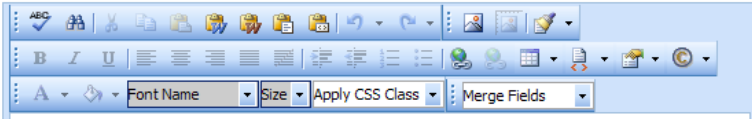
Communications Template

Manage Email Templates
 These are public templates, available to use when creating a communication. Leaving an empty From/From Email will result in the default organization settings. By adding one or more people to the To, they will always be added as recipients to a new communication that uses this template.

To  Stewie Administrator [Add...](#)
 Template Name
 From
 From Email
 Reply To Email
 Subject
 Attachments

Merge Fields
 The following merge fields are available to be used in the subject and message areas of your email. These fields will be replaced with the actual values for each individual that receives your email:

```
##ActiveMeter##, ##Age##, ##AnniversaryDate##, ##Area##, ##BirthDate##, ##Business##, ##Campus##, ##CommunicationID##,
##ContextParameterName##, ##ContributeIndividually##, ##CreatedBy##, ##DateCreated##, ##DateLastVerified##,
##DateModified##, ##DateSent##, ##Email##, ##EnvelopeNumber##, ##FamilyID##, ##FirstName##, ##ForeignKey##,
##ForeignKey2##, ##FormalName##, ##FullName##, ##Gender##, ##Gifts##, ##GivingUnitID##, ##GraduationDate##,
##GroupStatuses##, ##Guid##, ##InactiveReason##, ##IncludeOnEnvelope##, ##LastAttended##, ##LastName##,
##LatestStatus##, ##MaritalStatus##, ##MedicalInformation##, ##MemberStatus##, ##MiddleName##, ##ModifiedBy##,
##NavigationCaption##, ##NavigationUrl##, ##NextBirthDay##, ##NickName##, ##Notes##, ##OrganizationID##, ##PeerChannel##,
##Peers##, ##PersonDetailPageID##, ##PersonGUID##, ##PersonID##, ##Phones##, ##PhotoIconHTML##, ##PostalCode##,
##PreviousLastNames##, ##PrimaryAddress##, ##PrimaryAddressModified##, ##PrintStatement##, ##RecordStatus##,
##RegionName##, ##Relationships##, ##StaffMember##, ##Status##, ##Suffix##, ##Table##, ##Title##
```

HTML Message
 Use this HTML editor to format your email message.


- **To** – Click the [Add...](#) hyperlink to add existing records. You can add multiple records. You can also use this as a cc field for e-mail communications.
 - **Template Name** – Enter a name for this template.
 - **From** – Enter a name for the sender, if desired.
 - **From E-mail** – Enter an e-mail address for the send, if desired.
 - **Reply to E-mail** – Enter the reply e-mail address.
 - **Subject** – Enter a subject for this template, if desired.
 - **HTML Message** – Using the full HTML tools, format this template, as desired.
- 4) Click the **Save** button to save the template for use in future communications.
 - 5) Now go to **Communications>New Communication** and your template will display as an available template option.

Approving E-mails

If applicable, your Arena Administrator can add a page to allow designated users to approve Communications that exceed the threshold. Users with approval rights can view, approve, and reject the e-mails that exceed the threshold.

Steps to Approve E-mails, If Applicable:

- 1) Click the “**Approvers**” page.

Approver's Page



- 2) Click on the [E-mail](#) to review.

Review E-mails



- 3) After reviewing the e-mail, you can either **approve** or **reject** the e-mail. *Arena will send an e-mail notification to the requestor. If rejected, the reason will be included in the e-mail.*

Process E-mail

Reason for Rejection:

Rejected with a reason

Subject: [Arena Communication Rejected (Reason: Previous Email sent)]

Rejected without a reason

Subject: [Arena Communication Rejected (Reason:)]

If an e-mail Communication includes members with no e-mail address, you will have the option to create labels for these members.

Label option

Your communication has been queued on the email server.



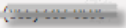

Note: The following people do not have a valid email address, but do have a street address on file. Would you like to print mailing labels for them?

[Arnault, Lee](#)

[Export To Word](#)

Arena tracks E-mail, SMS and Mail Communications on the Previous Communications page.

Previous Communication

Previous Communications:							
Date	Created By	Sender's Name	Sender's Email	Subject	Medium	Recipients	Successful
12/28/2009 11:16:00 AM	linda.j	Linda Johnson	linda.johnson@arenachms.com	Word label test	Mail	59	
12/28/2009 11:15:59 AM	linda.j	Linda Johnson	linda.johnson@arenachms.com	Word label test	Email	62	
12/1/2009 3:50:52 PM	linda.j	Linda Johnson		Text Message	SMS	1	



Prayer

Arena tracks all aspects of Prayer Requests with an approval process for each step, including prayer requests entered from your website, responses to the original requestor, and a record of answers and comments. Due to the sensitive nature of a prayer request, and the nature of the communication between the organization family and requestor, we have integrated an approval process for any information associated with the request. We understand each organization has its own process for handling prayer requests, including assigning specific personnel to handle certain tasks. In the following example, we assume different people are involved at each step.

Example:

Staff member A manually enters a prayer request. Staff member B reviews and approves the request as valid. Staff member C enters answers for approved prayer requests. Staff member D enters comments for approved requests.

- If the entry person does not have the security rights to approve the request, it is marked with a “Needs Approval” status. You can access these prayers only on the Approve Requests page. This is also the case if the user enters the prayer request via the Arena-managed website.
- The person responsible for approving requests can open the Approve Requests page, open the desired request, and determine whether to approve the request so it can move to the next step.
- If the request is valid and you enter all necessary information, the approver can check the **Approved** checkbox and click the **Save** button. The system will save the request and return a “The Prayer Request has been saved!” message.
- The prayer team can then pray for the request. They may type in answers or comments. When someone adds a comment or answer to the Prayer Request, the approver must re-approve the entry by going to the appropriate page (Approve Answers or Approve Comments).



Once a request is entered into Arena, it is always accessible (with the appropriate security role) from the All Prayer Requests page regardless of the status.

Add a Prayer Request

Steps to Create a New Prayer Request:

- 1) Click on the Add a Prayer Request link to display the page shown below. Complete the information on this page.

Add Prayer Request

Prayer Request Details

First Name	Jane	Person	Change...
Last Name	Sample	Content Category	Arena
Email	jane.sample@arenachms.com	Source	Friendship Card
Prayer Category	Travel	Status	Expired <input type="checkbox"/> Notified <input type="checkbox"/>
Request Response	<input checked="" type="checkbox"/>	Approved	<input checked="" type="checkbox"/> (4/27/2011)
Private	<input checked="" type="checkbox"/>	By	Linda Johnson
		Expiration Date	5/4/2011

Request

prayer for safe mission trip travel

Answer

Save

- **First Name** - Enter the First Name of the person requesting prayer, if the person is not in Arena.
- **Last Name** - Enter the Last Name of the person requesting prayer, if the person is not in Arena.
- **E-mail** - Enter the E-mail address of the person requesting prayer.
- **Prayer Category** – Click the drop-down list to select the category for this request.
- **Request Response** – Check this box if the requestor would like to receive an e-mail response to his or her prayer request.
- **Private** – Select this option if this prayer request is to be available to only those whom have access to private prayer requests.
- **Person** - Click the [Change...](#) link to enter a prayer request for a person in Arena.
- **Content Category** - Click the drop-down list to select a category for the content. *When a member enters a prayer from the Arena-managed website, the Content Category identifies the location on the Arena-managed website.*
- **Source** - Click the drop-down list to select a source for the request.
- **Status** – You can select Expired when a prayer is no longer active.
- **Approved** - This box is checked when the initial request is approved and is ready to be sent to the prayer ministry for prayer.
- **Expiration Date** – Enter the date the prayer should expire.
- **Request** – Enter the prayer in this field.
- **Answer** – Enter the prayer answer in this field. Arena will send a system email to the prayer requester, when Request Response is checked, containing the answer.

- 2) Click the Save button, or the Save & Clear button to save this request and enter another.

Approve Requests

Prayer Requests display on the Approve Prayer Requests page after entry. Clicking the Approve Requests link displays the page below, listing all requests that require approval. You may use the drop-down list filters at the top to filter the requests displayed.

Approve Prayer Requests

	Name	Comments
	Jon Doe	Please pray for my trip overseas.

Page: 1 of 1 Page Size: 75 Refresh 1 request(s)

[Approve Selected](#)

From this page, you can open person requests by clicking on the name [link](#) of the requestor. You may also select multiple requests by placing a checkmark next to each item you wish to approve and then selecting Approve Selected link.

Adding and Approving Answers

You can record answers by opening the prayer request and entering the answer in the Answer field. Click the Save button to save.

Prayer Request Answers

First Name	<input type="text" value="Jon"/>	Person	Jon Doe Change... Remove
Last Name	<input type="text" value="Doe"/>	Content Category	<input type="text" value="Default"/>
Email	<input type="text" value="jon.doe@arenachms.com"/>	Source	<input type="text" value="Phone Call"/>
Prayer Category	<input type="text" value="Staff/Ministry"/>	Status	Pending
Request Response	<input checked="" type="checkbox"/>	Approved	<input type="checkbox"/>
		Expiration Date	
Request			
<input type="text" value="Please pray for my trip overseas."/>			
Answer			
<input type="text" value="Jon called and said that his trip has been wonderfully productive!"/>			
<input type="button" value="Save"/>			

Approve Answers



Once you record an answer to a request, it displays on the Approve Answers page. Clicking on the Approve Answers link will display the page below listing all requests that have had answers recorded requiring approval. You may use the drop-down list filters to limit the requests displayed.

Approve Prayer Request Answers

	Content Category	<input type="text" value="All"/>						
	Source	<input type="text" value="All"/>						
	Prayer Category	<input type="text" value="All"/>						
<input type="button" value="Apply Filter"/>								
<table border="1"> <thead> <tr> <th></th> <th>Name</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Jon Doe</td> <td>Jon's trip went wonderfully.</td> </tr> </tbody> </table>				Name	Comments	<input type="checkbox"/>	Jon Doe	Jon's trip went wonderfully.
	Name	Comments						
<input type="checkbox"/>	Jon Doe	Jon's trip went wonderfully.						
Page: 1 of 1 Page Size: 75 <input type="button" value="Refresh"/> 1 answer(s)								
<input type="button" value="Approve Selected"/>								

From this page, you can open person requests by clicking on the name [link](#) of the requestor. You may also approve multiple requests by placing checkmarks next to each entry needing approval and clicking the Approve Selected link.

Adding Comments

You can add comments to an entry by opening the prayer request and clicking the Add link under Activity, or if there are existing comments, by clicking the Add New Comment  icon. Enter the comment and select that the comment is Approved (you must have the appropriate security role to do this), or that the requestor has been Notified. Click the Update  icon to save.

Prayer Request Comments

Activity:					
Name	First Activity	Last Activity	Approved	Notified	Comment
Jon Doe	09/24/07	09/24/07			Called to speak to Jon about the trip.

Approve Comments

All comments added to a prayer request require approval, otherwise, comments are never published and users without approval rights will not see the comments. Comments display on the Approve Comments page. Clicking on the Approve Comments link displays the page below, which lists all requests with new comments needing approval. Use the drop-down list filters to limit the requests displayed.

Approve Prayer Request Comments



Content Category

Source

Prayer Category

Apply Filter

Name	Comments
 Jon Doe	Spoke to Jon on the phone about his progress.

Page: 1 of 1 Page Size: 75 Refresh 1 response(s)

Approve Selected

From this page, you can open person requests by clicking on the name [link](#) of the requestor. You may also approve multiple requests by placing checkmarks next to each entry needing approval and clicking the Approve Selected link.

All Prayer Requests

This page will display all prayer requests regardless of their status. You may approve requests or delete requests from this page. Use the drop-down list filters to limit the requests to display.

All Prayer Requests

All Prayer Requests

Prayer Requests

First Name

Last Name

doe

Apply Filter

Status

All

Source

All

Content Category

All

Prayer Category

All

Date Between

and

Show

Private Only

Add

<input type="checkbox"/>	Name	Date	Approved	Prayer Count	Source	Category	Private	Request
<input type="checkbox"/>	Jon Doe	2/15/2008	✓	0	Friendship Card	General	✓	This is my request
<input type="checkbox"/>	Jon Doe	9/24/2007	✓	1	Phone Call	Staff/Ministry	✓	Please pray for my trip overseas.
<input type="checkbox"/>	Jon Doe	9/24/2007	✓	0	Phone Call	Family Issues	✓	Please ignore this test!

Page: 1 of 1

Page Size: 158

Refresh

3 Prayer Request(s)

Approve Selected

From the All Prayer Requests page, you can:

- Filter by name, status, sources, content category, prayer category, dates, public and private prayers.
- Approve selected prayers.
- Add a new prayer request.

Reports

The Reports area has identical functionality to the Reports section in Membership. No default reports for Prayer Requests are included in the default Arena installation, however any custom reports deployed to the Arena/Prayer folder of your Report Services will display here.



See Reports in under the **Membership** section of this manual for information on using custom reports and the **Reports** section of the *Arena Reference Guide* for information on creating and deploying custom reports, or visit <http://community.arenachms.com/> for more information.



Web Content

You can create and maintain Polls, Classified Ads, Newsletters, Photo Albums, E-Cards, and E-Invitations in the Web Content section. Since the interaction of these features is almost completely done on the Arena-managed website, the result is that the content is largely generated by the Membership base, for the Membership base.

Web Content then becomes a useful set of tools to not only communicate with your Membership base more effectively, but also get the Organization more involved with the local community, help the Membership base get involved with the Organization, with each other, and the community.



This section of the *Arena End User Manual* will only cover the Arena application part of the Web Content features. For help in getting these features onto the Arena-managed website, please refer to the *Arena Administrator Manual*.

Polls

Polls, when placed on the Arena-managed website pages, create a feature that enabling members to answer survey style questions, allowing the Organization to learn the opinions of their Membership base. You can also place Polls on internal Arena pages so that staff users are included.

Clicking on Polls under Web Content will bring up the list of currently created Polls. This list will show the Active Status, Poll Question, Category, the Modify Answers [link](#), the number of responses, and the number of answers.

Steps to create a New Poll

- 1) Click the Add New Poll icon. A new entry titled New Poll Question is added to the list.
- 2) Click the Edit icon to modify this poll. This will open the options within the list, as shown below.


Editing Polls









Active	Question	Category	Modify Answers	Response Count	Number of Answers	
✓	Opinion 1	Arena	Modify Answers		0	
✓	Question 2	Default	Modify Answers		0	
<input type="checkbox"/>	New Poll Question	Default	Modify Answers		0	





Page: 1 of 1 Page Size: 140 [Refresh](#) 3 Poll(s)

- 3) Check if this Poll will be Active.
- 4) Enter the desired question.
- 5) Choose the Category in which this poll will display.
- 6) Click **Update** to save, **Cancel** to go back without saving, or **Delete** to remove this Poll.
- 7) Click the [Modify Answers](#) link to add new Poll Answers or modify existing Answers. This will open the Answer List, showing the Poll Answer, the number of Responses, and arrows for ordering the answers.

Steps to add a Poll Answer:

- 1) Click the Add **New Poll Answer**  icon to enter a new answer, as shown below. *If you already know how many answers you want and what they will be, click Add New Poll Answer until you have the desired number. There will be several answers entitled New Answer.*

Answer	Responses			
New Answer	0			
New Answer	0			
New Answer	0			
Page: 1 of 1 Page Size: <input type="text" value="15"/> <input type="button" value="Refresh"/> 3 PollAnswer(s)				

- 2) Click the **Edit this Poll Answer**  icon to edit the answer. *Click the  icon to enter the number of responses manually.*
- 3) Enter the **Answer value**.
- 4) Click the **Update**  icon to save.
- 5) **Repeat** the last four steps for each choice you will offer for an answer.
- 6) Click the  icon to drop and drop the field to the **desired position**. *The poll will list the possible answers in the order listed here. Click on the Return to polls link when finished to return to the Poll list.*

Classifieds


The Classifieds feature has two main types, Classified and Business Directory. These will have separate sections on the Arena-managed website. Users can submit classified ads and business directory listings. Once approved, the classifieds ads and directory listings are available on the Arena-managed website.

Users submit classified entries from the Arena-managed website. You manage the Classifieds section under Web Content. Clicking on Classifieds displays a list of all Classifieds, as shown below. This list will show the Ad Title, the Author of the Ad, the Classified Category, the Content Category, the date Last Modified, the Approval status, and if the Ad has Expired. Use the filter options at the top to choose exactly what Classified Ads to show.

Classified Ads

Classifieds

Administrative page for classifieds section of the website.



Content Category

All

Classified Category

All

Classified Type

All

Status




☐ Approved

☒ Not Approved

Show Expired

☐ Yes

Apply Filter

Title	Author	Category	Content Category	Date Entered	Last Modified	Approved	Expired
 Treadmill	 Administrator, Stevie	Health / Fitness	Default	4/25/2010	4/25/2010		

Page: 1 of 1 Page Size: 158 Refresh 1 Classified(s)

Steps to process a submitted Classified:

- 1) Clicking on the **Title** [Name](#) link will open the classified submission.
- 2) **Review and edit**, as desired.

Classified Details

The screenshot shows a web form titled "Modify Classified". It has the following fields and controls:

- Title:** A text input field containing "Ford Explorer".
- Text:** A large text area containing "Green 1996 Ford Explorer for sale. Great mileage, looks great." and "\$5,000 OBO.".
- Phone:** A text input field containing "(555) 555-5555".
- E-mail:** A text input field containing "support@arenachms.com".
- Expire Date:** A date picker showing "11/21/2007" with a "(max date)" label below it.
- Approved:** A checkbox that is checked.
- Classified Category:** A dropdown menu showing "Automotive (C)".
- Content Category:** A dropdown menu showing "Arena".
- Picture:** A section with a small image of a green car, a "Remove Image" button, and "Browse..." and "Upload" buttons.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.


- **Title** – This is the title of the ad; this will display as the Classified Ad entry.
 - **Text** - This is the description of the item.
 - **Classified Category** - Click the drop-down list to choose the Category in which the item will display.
 - **Content Category** - Click on the drop-down list to choose in which content area the ad will display.
 - **Phone** – This is the phone number of the person listing the advertisement.
 - **E-mail** – This is the e-mail address of the person listing the advertisement.
 - **Expire Date** – This is the date on which the ad will expire and no longer display.
 - **Approved** – Select this box to approve the item.
 - **Picture** - Click the Browse button to select a picture to upload so that it will display in the ad along with the text.
- 3) Click the **Approved** box.
 - 4) Click the **Save** button when finished.

Newsletter

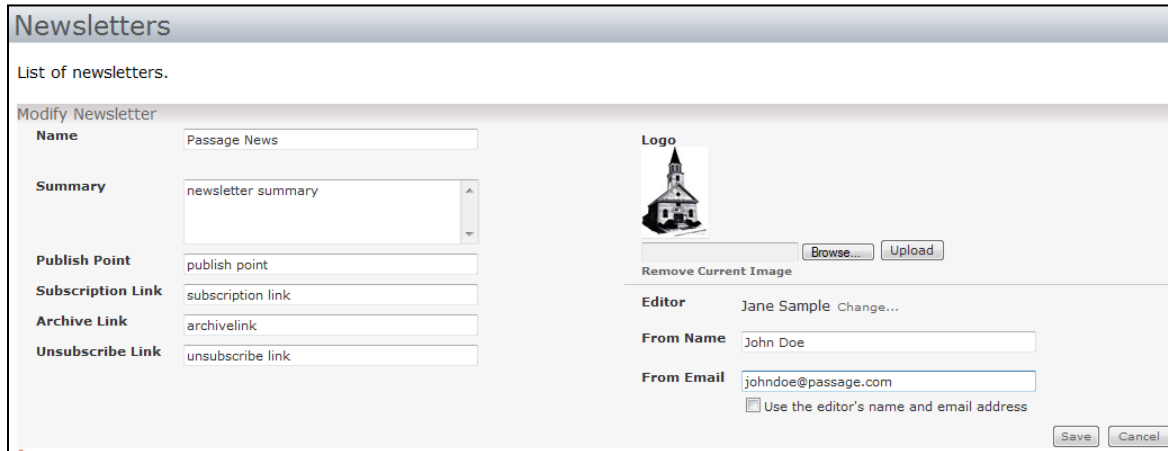
The Newsletters features are for placing news and information on your Arena-managed website, enabling user the ability to subscribe. A Newsletter consists of Volumes, which in turn contains Articles and the Authors of said articles. You have the flexibility to structure the newsletter to fit your organization. For example, you can choose to publish one Newsletter with a yearly Volume, or a new Volume every month with several Articles or and a weekly Newsletter.

Steps to Create a Newsletter:

Each Newsletter is comprised of a Volume number, Author and Articles. The first step is to create your Newsletter.

- 1) Click on the Add New Newsletter  icon to create a Newsletter.
- 2) Enter the appropriate information for this newsletter.

Newsletter Settings





- **Name** – This is the name of the Newsletter.
 - **Summary** – Enter a summary for the Newsletter.
 - **Publish Point** – This is the URL of the website to publish the Newsletter.
 - **Subscription Link** – If you wish to have a link within the Newsletter where a reader can subscribe, enter the URL for the page link.
 - **Archive Link** - This optional link is to a website URL where past issues of the Newsletter are available.
 - **Unsubscribe Link** – This URL leads to a website where current Newsletter subscribers can cancel their subscriptions. This will be included in the Newsletter E-mail.
 - **Logo** – Click the Browse button to choose a Logo Image and click Upload to use it for this Newsletter.
 - **Editor** – Click on the Change... link to assign or change an editor to this Newsletter. This will open the **Person Pop-up Search**, where you can choose a person. *If there is no editor, the check box is disabled.*
 - **From Name** – Enter the name of the sender of the newsletter.
 - **From Email** – Enter the e-mail address of the send of the newsletter.
- 3) Click the **Save** button when finished.
 - 4) Click on the Newsletter Name [link](#) to open the Newsletter Details and view the Volume and Author Lists.



NEWSLETTER VOLUMES

The Volume List will show the Publication Date, Volume Name, the number of Articles, Publications Status, Sent (via E-mail) status, the number of Reads, and a Preview [Link](#) for each Volume created within the Newsletter selected, as shown below.

Newsletter Volume List

Newsletter Volumes						
Below are the volumes for the current newsletter.						
Publication Date	Name	Article Count	Published	Sent	Reads	
10/11/2007	[new volume]	0			0	Preview   
Page: 1 of 1 Page Size: 140 Refresh 1 Volume(s)  						

Steps to create a Newsletter Volume:

- 1) Click the Add New Volume  icon to add a new volume or issue. This will create a new entry named [new volume]. Click on the Edit  icon to open the Volume Details.
- 2) Complete all fields, as desired.

Volume Details

Modify Newsletter Volume

Name

[new volume]

Notes

Promotion Summary

Publish Date

10/11/2007

Sent Status

Not Sent

Published

☐

Promotion Image

no image selected

[Browse...](#)

[Upload](#)

[Save](#)







[Cancel](#)

- **Name** - Enter the name of this Volume.
 - **Notes** - Enter any additional description needed to identify this issue.
 - **Promotion Summary** – You can enter a summary for the promotion, if this Volume will be Promoted on the website.
 - **Publication Date** - This is the date the finished issue is placed on the web. This will default to the Volume created date.
 - **Sent Status** - This is a system-generated field that shows the date the newsletter was sent (if it was), or it shows Not Sent.
 - **Published** - Check this box to indicate you have published this Volume on the Arena-managed website.
 - **Promotion Image** - Click the Browse... button to locate an image for the promotion of this Volume.
- 3) Click the **Save** button when finished.



NEWSLETTER AUTHOR

Before you create Articles, you will need to add at least one author. Below the Newsletter Volumes is the Author List that includes information about each author.

Newsletter Author List

Newsletter Authors						
The individuals below are identified as authors to the current newsletter.						
Name	Source	Read Count	Number of Articles	Avg Score	Score Count	
[new author]		0	0		0	  
Page: 1 of 1 Page Size: 140 Refresh 1 Author(s)   						

Steps to create a Newsletter Author:

- 1) Click the **Add New Author**  icon. This will create an author named [new author].
- 2) Click the **Edit**  icon to open the author page. *The information you enter here will display on your organization's Arena-managed website for the Author information in the Article.*

Author Details

Modify Author

First Name

Last Name

Email

Bio

Source

Author Image
no image selected

[Browse...](#) [Upload](#)

[Save](#) [Cancel](#)

- **First Name** - Enter the first name of the Author.
 - **Last Name** - Enter the last name of the Author.
 - **E-mail** - Enter the e-mail address for the Author.
 - **Bio** - Enter the biographical information for the Author.
 - **Source** - Click the drop-down list for the source of the Author. See your Arena Administrator to edit Sources.
 - **Author Image** - Click the Browse... button to locate an image for the Author. Click Upload to add it to the Author entry.
- 3) Click **Save**.



NEWSLETTER ARTICLES

The last part of the Newsletter features is where you create Art. The Article List page displays the Article Name, Average Score, the number of times Read, a thumbnail for the Summary and Article images, Summary Word Count, and the Text Word Count.

Volume Article List

Volume Article						
Below are the articles for the selected volume.						
Name	Avg Score	Read Count	Summary Image	Article Image	Summary WC	Text WC
[new article]		0			0	0
<div> <div>Page: 1 of 1</div> <div>Page Size: 140</div> <div>Refresh</div> <div>1 Article(s)</div> </div>						

Steps to Create a New Article:

- Click on the **Add New Article**  icon. This will create an entry named [new article].
- Click on the **Edit**  icon to set up the actual information in the article, as shown below.

Article Details

Modify Article

Title

[new article]

Summary

Copyright Info

Copyright Owner

Article Type

Author

Article Full Text

Summary Image

no image selected

Browse...

Upload

Article Image

no image selected

Browse...

Upload

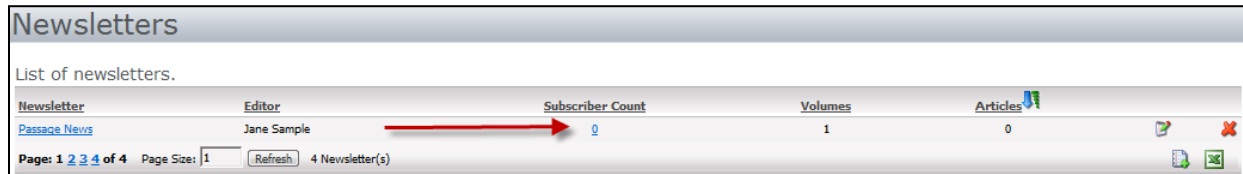
Save

Cancel

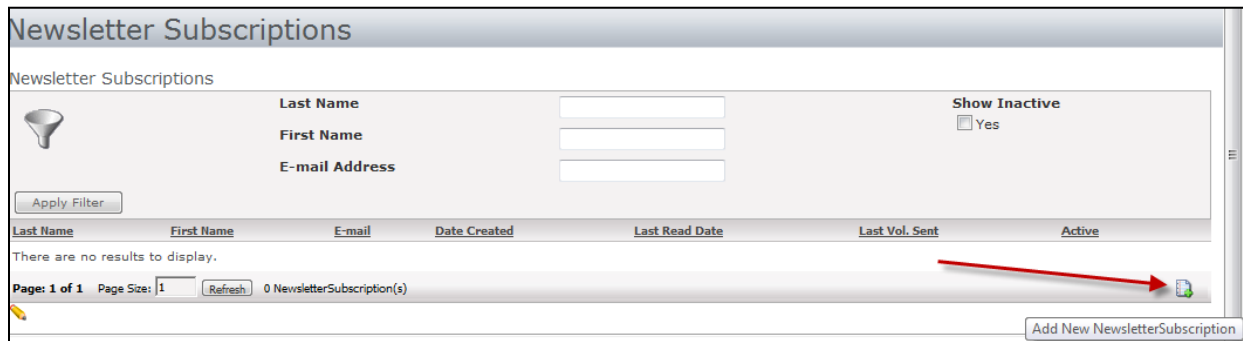
- **Title** - Enter the title of the article.
 - **Summary** - Enter a concise overview of the article that will display as the link to the article on the Arena-managed website.
 - **Copyright Info** - Enter the details concerning copyright information relating to this article.
 - **Copyright Owner** - Select the owner of the copyright from the drop-down list. *You can customize options in the Newsletter Copyright Owner Lookup.*
 - **Article Type** - Select if this Article will be a Feature Article or a Body Article. *A Featured Article will show in the Volume Summary, and a Body Article will only display when users view the full Volume.*
 - **Author** - Click the drop-down list to select the author of the article. *You can create the authors in the Newsletter Authors section.*
 - **Article Full Text** - Enter the full article in this field, using RAD editor functions as desired.
 - **Summary Image** - Click the Browse... button to associate a photo with a group of articles that are in the same category. Click the Upload button to include it in the article.
 - **Article Image** - Click the Browse... button to associate a photo with this specific article. Click the Upload button to include it in the article.
-
- Click **Save** when you are finished.


Steps to Add a Newsletter Subscriber:

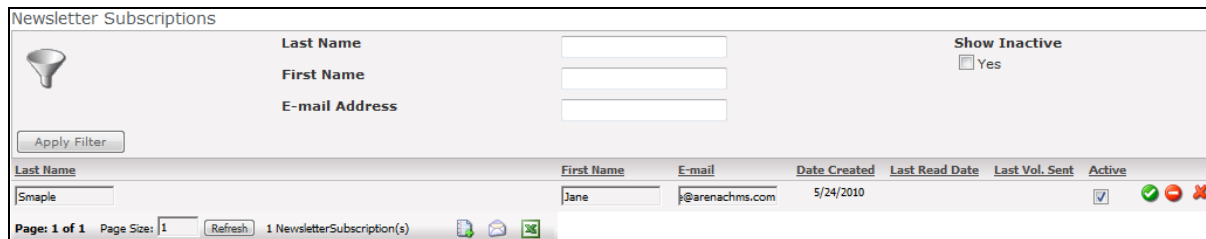
- 1) Go to the **Newsletter** page.
- 2) Click the [number](#) in the Subscriber Count column.



- 3) Click the **Add Newsletter Subscription** link.



- 4) Enter in the first name, last name and e-mail address.
- 5) Click the Update  icon.



Arena does not add people entered on this page.

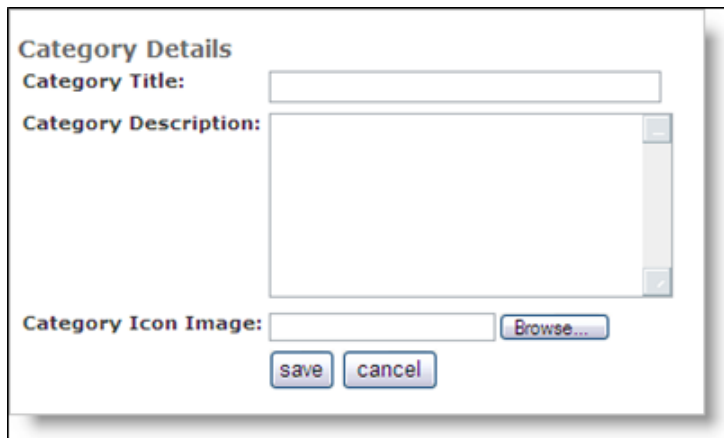
Photo Albums

The Photo Albums section of Web Content is where you can keep track of and organize the pictures related to your ministry. You can group Photos into categories to make finding Photos easier. You can add Photo Categories to other Categories, meaning that you can structure your Photos to fit the needs of your organization.

Clicking on Photo Albums will show the top Photo Category, which is All Photos, any Photo Categories set up under All Photos, and any loose Photos not under a child Category.



Steps to Add a Category:

- 1) Click the **Add Category button**. *This will display the Category Details page, as shown below.*
- 2) Complete **fields** and **upload category photo**, as desired.

A screenshot of a web form titled "Category Details". It contains three main sections: "Category Title:" with a single-line text input field; "Category Description:" with a multi-line text area; and "Category Icon Image:" with a single-line text input field and a "Browse..." button. At the bottom of the form are "save" and "cancel" buttons.

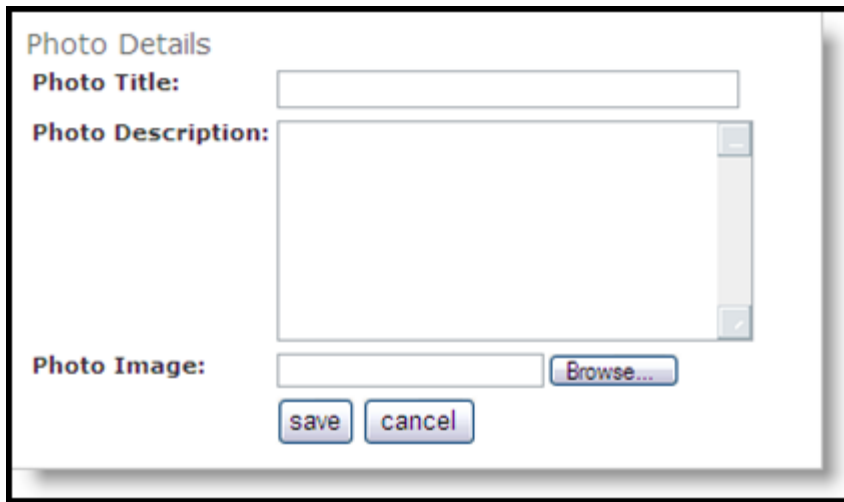
- **Category Title** - Enter the title for this Photo Category.
 - **Category Description** - Describe the type of photos included in this Photo Category.
 - **Category Icon Image** - Click the Browse... button to associate an image with this Photo Category.
- 3) Click the **Save**. *Now you are ready to add photos to this category.*
 - 4) Click on the Category Title or the Category Icon to open the Category and view Child Categories and any Photos under this Photo Category.



- Click the Delete icon  to remove this Category and any child Categories and Photos within.
- Click the Edit icon  to change the details of the Category.

Steps to Add a Photo:

- 1) Click the Add Photo button.
- 2) Complete fields and upload a photo.



The screenshot shows a 'Photo Details' dialog box. It has a title bar and a close button. The main content area is divided into three sections. The first section, 'Photo Title', has a label and a single-line text input field. The second section, 'Photo Description', has a label and a multi-line text area with a vertical scrollbar. The third section, 'Photo Image', has a label, a single-line text input field, and a 'Browse...' button. At the bottom of the dialog are 'save' and 'cancel' buttons.

- **Photo Title** – Enter title for the photo.
 - **Photo Description** – Enter a description to help identify this photo.
 - **Photo Image** – Click the Browse... button to locate the photo.
- 3) Click **Save**.

E-Cards and E-Invitations

You can create E-Cards and E-Invitations to make available on your organization's Arena-managed website. Examples are Get Well cards, Congratulations cards, and Birthday party invitations.



Since the E-Card and E-Invite, templates are set up the same with the exception of one setting change, for the purposes of this guide we will only look at E-Cards.

Click on E-Cards under Web Content will bring up the list of created E-Cards. This list shows the Title, Category, Format, Type, Content Category, and an Active Status indicator, as shown below.


E-Card List

Title	Category	Format	Type	Content Category	Active
Birthday Card	Birthday	Image	E-Card		✓
Get Well Soon Card	Get Well	Image	E-Card		✓
Party Time!	Party Invite	Image	E-Invite		✓

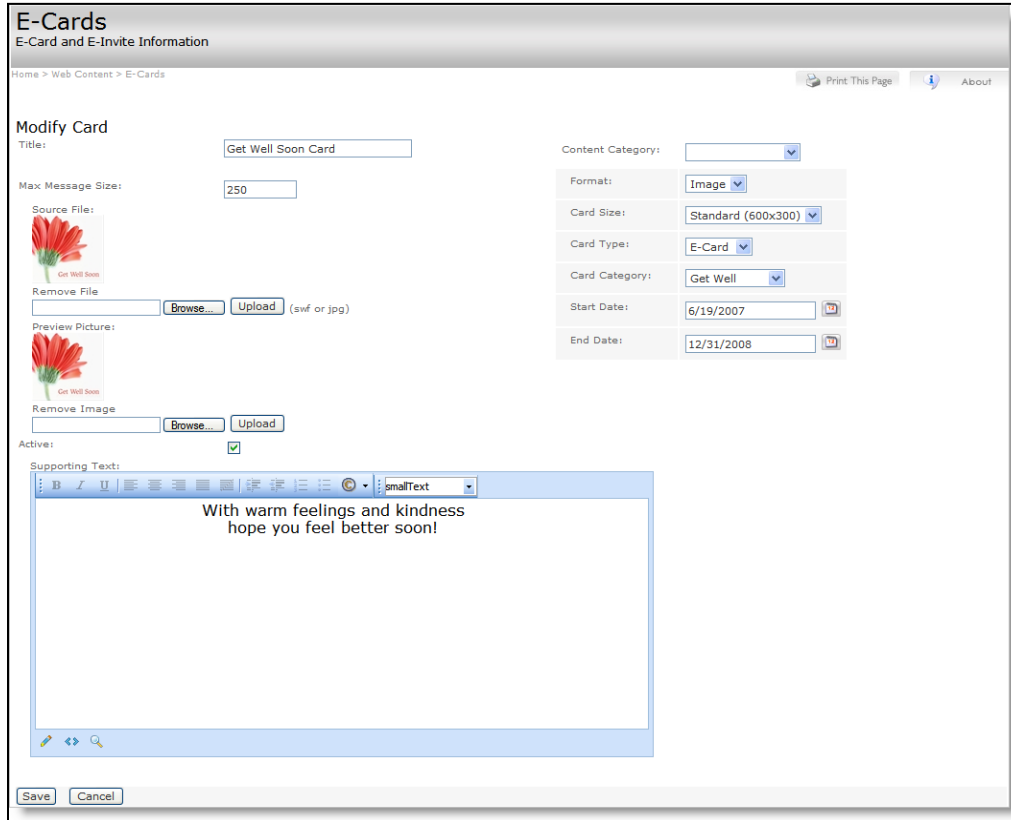
Page: 1 of 1 Page Size: 200 Refresh 3 ECard(s)

- **Title** – This is the title of the card or invite.
- **Category** – This is the E-Card Category defined in E-Card Category Lookup.
- **Format** – This identifies if the card is in image or flash format.
- **Type** – This is the type of card defined in the E-Card Type Lookup. *E-Card and E-Invite are default types.*
- **Content Category** – This is the Content Category, and defines where to display the card.
- **Active** – This makes a card or invite active or inactive.

Steps to Create an E-Card:

- 1) Click **Create a New E-Card**. When a Card does exist, click the **Add New E-Card**  icon on the lower right to create an additional E-card. Either will open the E-Card Details page to set up the Card, as shown below.
- 2) Enter the **appropriate fields** or make the appropriate selections for your E-Card or E-Invite.

E-Card Details



E-Cards
E-Card and E-Invite Information

Home > Web Content > E-Cards

Print This Page About

Modify Card

Title:

Content Category:

Max Message Size:

Format:


Card Size:

Card Type:


Card Category:

Start Date:

End Date:

Source File: 

Remove File: (.swf or .jpg)

Preview Picture: 

Remove Image:

Active: ☒

Supporting Text:

With warm feelings and kindness
hope you feel better soon!

- **Title** - Enter a Title for the Card.
- **Max Message Size** – Change the message size, as desired. *The default value is 250 characters.*
- **Content Category** - Choose a Content Category for this Card. You can leave it blank.
- **Format** – Choose a format. Choose a Card Format for the image type. By default, Image (.jpg files) and Flash (.swf files) already exist.
- **Card Size** – Select a card size. *The Standard 600x300 pixels is the default value.*
- **Card Type** - This is what determines if this card as an E-Card or an E-Invite.
- **Card Category** - This allows you to sort your cards into different Categories, such as Birthday, Holiday, Get Well, etc.
- **Start Date** – This is the starting date for the Card to be Active and therefore available for use on the Arena-managed website.
- **End Date** – This is the date the Card will become inactive. If the current date is outside of this date range, then this card will not show on the website.
- **Card Source Image File** – This is the actual image for the Card. Click the Browse button to choose a file, and click Upload to add the image to the database.

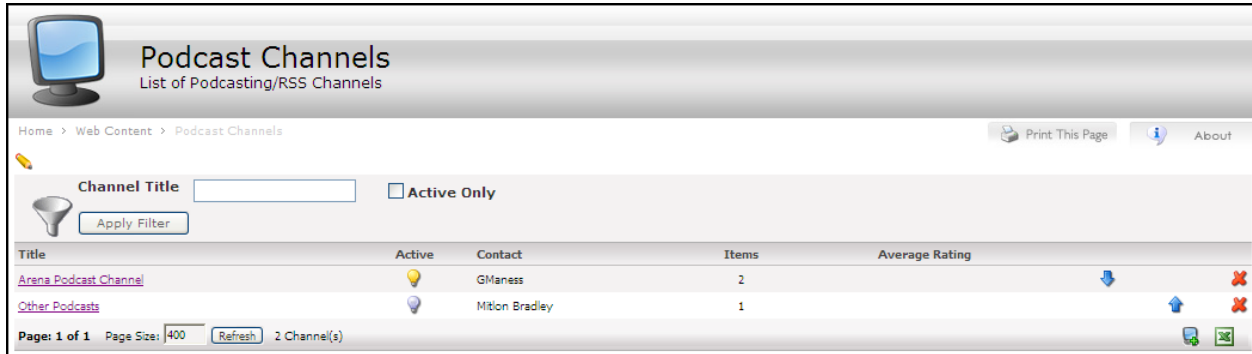
- **Card Preview Image File** - This can be the same as the Source Image or not. This allows you to have different size images, like a Thumbnail for the Category List module/control on the website and a larger image for the actual card.
- **Supporting Text** - This is the text that shows on this card, regardless of the actual message copy. This can be a scripture passage, an inspirational quote, or your own well wishes.

3) Click **Save** when finished.

Podcast Channels:

The first step in hosting podcasts from within Arena is to set up podcasting or RSS channels. Podcast/RSS channels by default are setup under the Web Content

Podcast Channels



The screenshot displays the 'Podcast Channels' web interface. At the top, there's a header with a monitor icon and the title 'Podcast Channels' with the subtitle 'List of Podcasting/RSS Channels'. Below the header is a breadcrumb trail: 'Home > Web Content > Podcast Channels'. To the right of the breadcrumb are links for 'Print This Page' and 'About'. Below the breadcrumb is a search bar labeled 'Channel Title' with an 'Apply Filter' button and a checkbox for 'Active Only'. The main content area is a table with the following columns: 'Title', 'Active', 'Contact', 'Items', and 'Average Rating'. The table contains two rows: 'Arena Podcast Channel' with 2 items and 'Other Podcasts' with 1 item. At the bottom of the table, there's a footer showing 'Page: 1 of 1', 'Page Size: 400', a 'Refresh' button, and '2 Channel(s)'. On the right side of the table, there are icons for sorting (down arrow), filtering (up arrow), and deleting (red X).

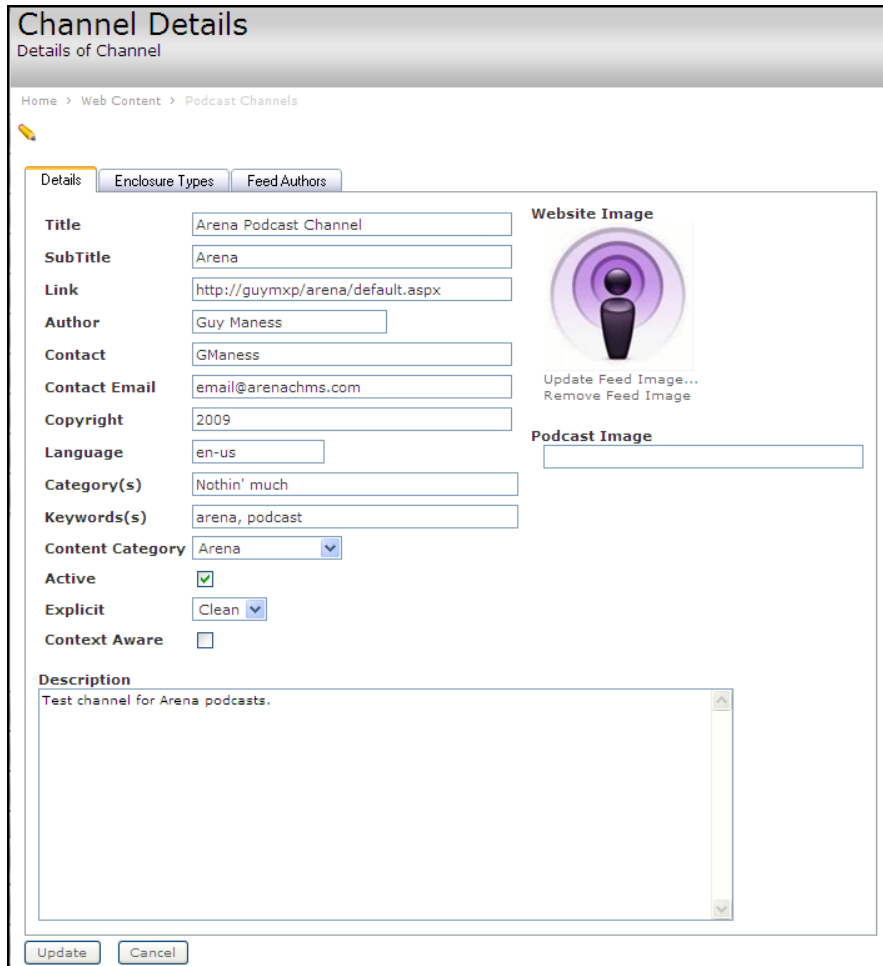
Title	Active	Contact	Items	Average Rating
Arena Podcast Channel		GManess	2	
Other Podcasts		Milton Bradley	1	

Page: 1 of 1 Page Size: 400 Refresh 2 Channel(s)

Steps to Add a Podcast Channel:

- 1) Click the **Add New Channel**  icon.
- 2) On the Details tab, **enter all appropriate information** for this channel.

New Podcast Channel



- **Title** – User provided title to display for this channel.
- **SubTitle** – User provided subtitle to display for this channel.
- **Link** – Enter the Link for this channel.
- **Author** – This is the author of the channel.
- **Contact** – This is the contact name of the channel.
- **Contact Email** – This is the e-mail address of the channel's contact.
- **Copyright** – This is the copyright information to display for this channel.
- **Language** – This is the language description to display for this channel.
- **Category(s)** – This is a list of categories for this channel (a comma-separated list).
- **Keywords(s)** – This is a list of keywords for this channel (a comma-separated).
- **Content Category** – Select the desired Content Category lookup to associate with this channel.
- **Active** – Check this box to activate this channel.
- **Explicit** – Select the description of the type of content to host on this channel.
- **Context Aware** – Check this box if this channel should location aware.

- **Description** – User provided description of this channel.
- **Website Image** – You can upload an image to display for this feed channel on your public website.
- **Podcast Image** – Input a URL for publicly hosted image, used for podcasting from this channel.

3) Click the **Enclosure Types Tab**.

Enclosure Types

Channel Details
Details of Channel

Home > Web Content > Podcast Channels

Details Enclosure Types Feed Authors

Enclosure Types
Enclosures are how your audio and/or video content will be distributed. Select from the list below which types of enclosures that you will be creating for this feed. Each of the different enclosure types will be available to your subscribers as a different feed so that they can choose which feed is most appropriate for them. The local url of your feed will be displayed once you save your changes, but if you plan to use a service like FeedBurner to abstract the feed url, you can enter a different url for each enclosure type.

Publish	Format	Descriptor	Mime Type	Feed URL
<input checked="" type="checkbox"/>	Audio		audio/mpeg	
<input checked="" type="checkbox"/>	Video		video/mp4	

Update Cancel

- **Publish** – Check this box to select which Feed Formats to allow as enclosures for this channel (This example allows both Audio and Video).
- **Feed URL** – Enter the URL of a public site that offers forwarding services to abstract the feed URL (FeedBurner is an example of such a service). *This is available if the select Feed Format was set up for "Public Format", Arena allows you to point to the URL.*

4) Click the **Feed Authors Tab**. Use this tab to input the authors of the individual feeds for within this channel. Authors added are available for selection when creating the individual podcast items.

Feed Authors

Channel Details
Details of Channel

Home > Web Content > Podcast Channels

Details Enclosure Types Feed Authors

Feed Authors
Authors are the people or organizations that will be authoring content for your feed. This would typically be speakers of your audio/video content, or the writers of your text posts.

Name	Description
Jimmy Dean	The king of sausage

Update Cancel

5) Click **Update**.

Once you create a podcast channel, you can add topics beneath the channel. Topics are simply containers that are used to group podcast items together for better organization of your podcasts. A list of topics created for a particular channel will display in a small window at the bottom of the Channel Details page, as shown below.

Feed Format Topics

Test channel for Arena podcasts.

Formats

Below are the Feed URLs for this channel. The Rss.aspx page that is used to generate the feed will first generate an XML document based on the active items in this channel. This can be viewed by clicking the "Xml" url. The Rss.aspx page will then transform the generated XML using the Xslt file specific to the format. The Xslt file can be viewed by clicking the "Xslt" url. The transformed output is the actual RSS Feed Xml and can be viewed by clicking the "Feed" url. If you have specified a third-party feed management tool for a particular format (enclosure type), that feed should pull it's data from the "Feed" url listed here (with a full domain included). You can view the external feed url by clicking the "External Feed" url listed here.

	Xml	Xslt	Feed	External Feed
Audio	rss.aspx?c=2&f=1&xml=true	xslt/rss/default.xslt	rss.aspx?c=2&f=1	
Video	rss.aspx?c=2&f=3&xml=true	xslt/rss/default.xslt	rss.aspx?c=2&f=3	

[Edit Channel](#)

Topics [Items](#)

Topic Title ☐ Active Only [Apply Filter](#)

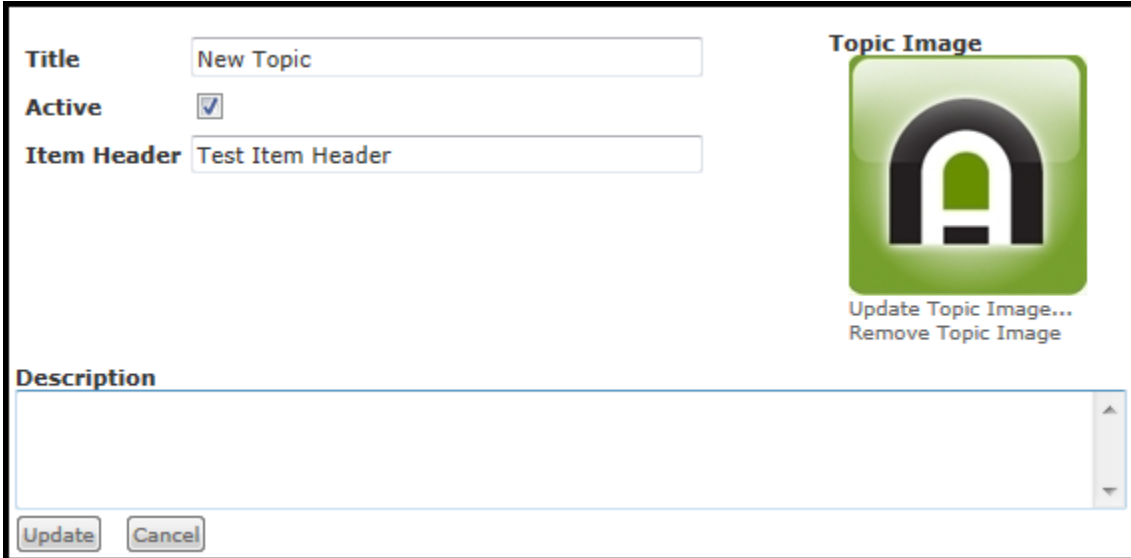
Title	Active	First Item	Last Item	Items	
Audio		10/2/2009	10/2/2009	1	
Video		9/21/2009	9/21/2009	1	

Page: 1 of 1 Page Size: 400 [Refresh](#) 2 Topic(s)

Steps to Create a New Topic:

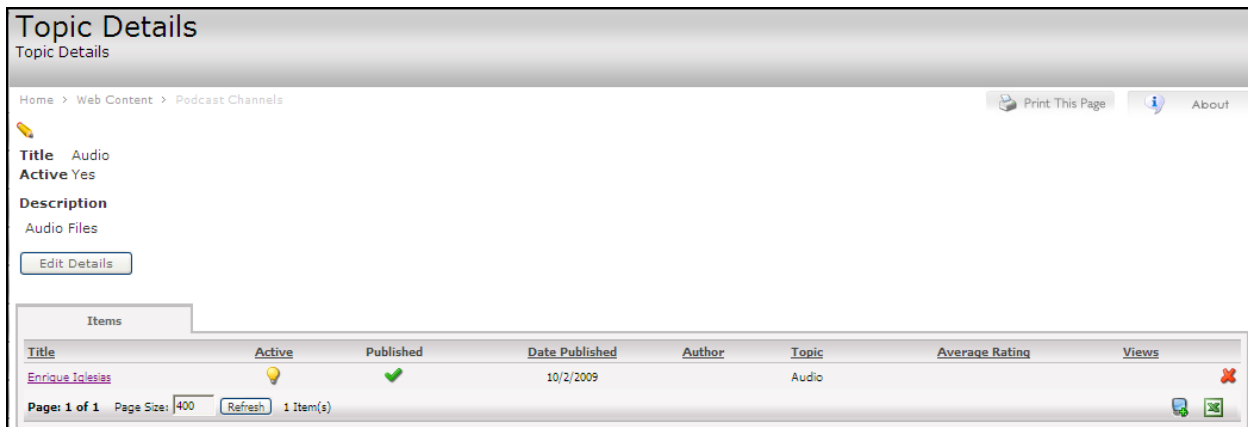
- 1) Click the **Add New Topic**  icon.
- 2) Complete **appropriate fields**.

Topic Details



- 3) Click **Update**. *You can now add a Topic Item.*
- 4) Select the [Topic Title](#) for the Topic Details page.

Available Topics




Topic Details

Topic Details

Home > Web Content > Podcast Channels

Print This Page About




 Title Audio

Active Yes

Description

Audio Files

Edit Details

Title	Active	Published	Date Published	Author	Topic	Average Rating	Views
Enrique Iglesias			10/2/2009		Audio		

Page: 1 of 1 Page Size: 400 Refresh 1 Item(s)

5) Select the **Edit Details**.

Topic Item Detail

The screenshot shows a web form titled "Topic Item Detail". It includes the following elements:

- Topic:** A dropdown menu with "New Topic" selected.
- Title:** A text input field with "New Item" entered.
- SubTitle:** An empty text input field.
- Keywords:** An empty text input field.
- Link:** A text input field with "www.link.com" entered.
- Author:** A dropdown menu.
- Active:** An unchecked checkbox.
- Explicit:** A dropdown menu with "No" selected.
- Publish Date:** A date picker and a time input field.
- Expire Date:** A date picker and a time input field.
- Enclosure:** A table with columns: Enclosure, Url, Time (mm:ss), and Size (bytes). The first row has "test" in the Enclosure column, an empty Url field, an empty Time field, and "0" in the Size field.
- Description:** A large text area for entering a description.
- Website Image:** A button labeled "Update Item Image..."
- Podcast Image:** A text input field.
- Buttons:** "Update" and "Cancel" buttons at the bottom left.

- **Topic** – Select a topic.
- **Title** – Enter a title to display for this item.
- **SubTitle** – Enter a subtitle to display for this item.
- **Keywords** – Enter a comma-separated list of keywords.
- **Link** – Enter the link for this Topic.
- **Author** – Enter the name to display as author of this item.
- **Active** – Check this box to activate/deactivate this item.
- **Explicit** – Select description of the type of content in this item.
- **Publish Date** – Enter the date and time to start making item publicly available.
- **Expire Date** – Enter the date and time to stop making item publicly available.
- **Enclosure/URL** – Enter the publicly hosted URL that contains the actual file. The URL must be in the URL box for the appropriate Enclosure type. If you know the length of the clip, enter it in mm:ss format in the Time block. This time will display in the feed. The size information will automatically fill when you select the "Update" button and the item is fully set up. Arena will attempt to find the file at the provided URL, then pull the file size of the item and populate the Size field.
- **Website Image** – You can upload an image to display with this item as it plays on your external website
- **Podcast Image** – Input URL for publicly hosted image to be displayed for this item.

6) Click **Update**.

Publishing Podcasts

Once the feeds, channels, topics and items are properly setup, the RSS feed is ready to publish your podcasts. Each unique channel/feed combination is going to have its own RSS feed for which users can subscribe. The screenshots below show this relationship.

Channel Details Page

channel for Arena podcasts.

Formats

Below are the Feed URLs for this channel. The Rss.aspx page that is used to generate the feed will first generate an XML document based on the active items in this channel. This can be viewed by clicking the "Xml" url. The Rss.aspx page will then transform the generated XML using the Xslt file specific to the format. The Xslt file can be viewed by clicking the "Xslt" url. The transformed output is the actual RSS Feed Xml and can be viewed by clicking the "Feed" url. If you have specified a third-party feed management tool for a particular format (enclosure type), that feed should pull it's data from the "Feed" url listed here (with a full domain included). You can view the external feed url by clicking the "External Feed" url listed here.

	Xml	Xslt	Feed	External Feed
Audio	rss.aspx?c=2&f=1&xml=true	xslt/rss/default.xslt	rss.aspx?c=2&f=1	rss.aspx?c=2&f=1
Video	rss.aspx?c=2&f=3&xml=true	xslt/rss/default.xslt	rss.aspx?c=2&f=3	rss.aspx?c=2&f=3


Relative URL for RSS feed containing all items using Audio type enclosure on this channel





Relative URL for RSS feed containing all items using Video type enclosure on this channel



[Edit Channel](#)

Topics

Topic Title ☐ Active Only

 [Apply Filter](#)

Title	Active	First Item	Last Item	Items
Audio		10/2/2009	10/2/2009	1 
Video		9/21/2009	9/21/2009	1 

Page: 1 of 1 Page Size: 400 [Refresh](#) 2 Topic(s)  



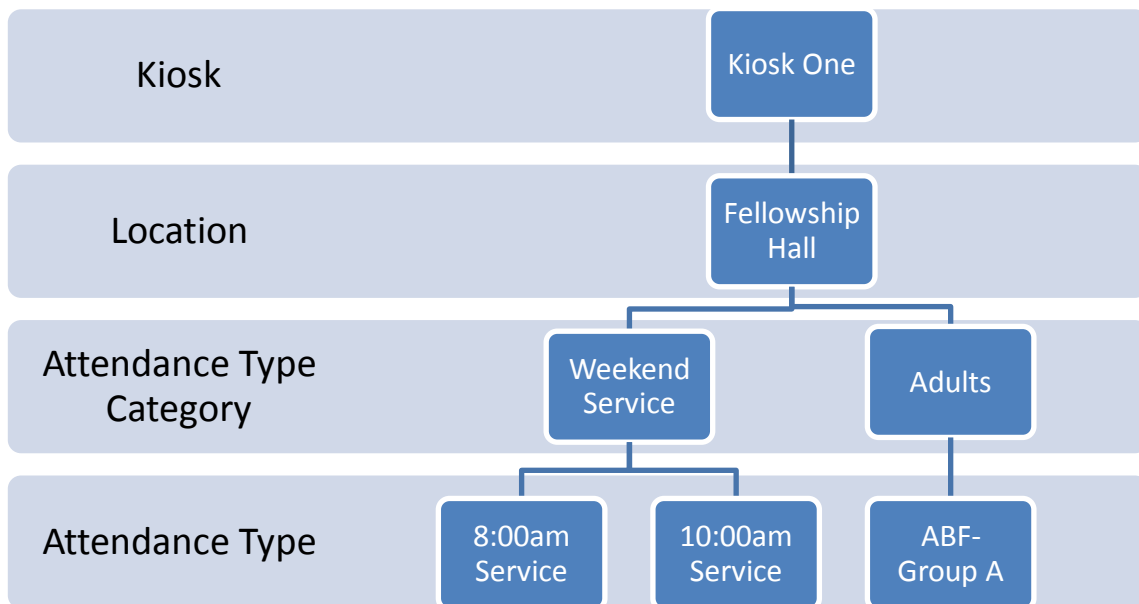
Check-In

Arena's Check-In system is a detailed mechanism to ensure that the correct people end up in the correct classes at the correct time, but this can sometimes be a bit confusing to set up. This section covers how to configure and use Check-In to enter, track, and monitor attendance. Check-In works with independent kiosks, such as stand-alone computers with barcode readers, and label printers. Ideally, you can use these stations without supervision to allow a quick and efficient check-in process for individuals and families. You can tie Check-In to a Small Group, Group Level, or Tag, or use as its own Attendance Type Category for manual check in.



If you are using Arena Check-In and would like to allow non-family members to Check-In one another, your Administrator can create a **Relationship Type** containing the phrase "can checkin" (case insensitive, no quotes) that will permit this action.

As you begin to evaluate your organization for Check-in configuration, below is a diagram of a basic Check-In configuration.



Kiosks

The Kiosk page is where you can add and maintain Kiosks used for Check-In. Each Kiosk runs on a schedule, which determines when the kiosk is available for use. To connect a Kiosk with Arena, you can simply load the Check-In application directly from Arena or manually add the Kiosk on this page.

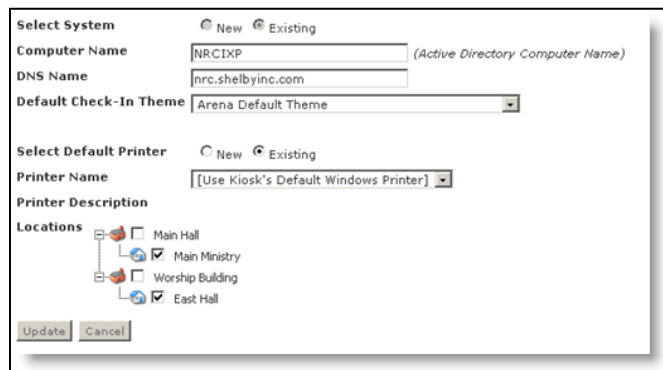
Kiosk List

Name	Default Printer	
NRCIXP	Support 2	Schedule
Adults Check In	Support 1	Schedule
Grade School Check In		Schedule
Page: 1 of 1 Page Size: 75 Refresh 3 Kiosk(s)		

Steps to add a Kiosk manually:

- 1) Click the **add kiosk**  icon.
- 2) **Complete all fields**, as shown below.

Kiosk Management Page




- **New or Existing** – Select if the kiosk is one already connection to the network or is a new kiosk.
- **Computer Name** – Enter the name for this, primarily for reporting.
- **DNS Name** – Enter the DNS (Domain Name Server) for the Kiosk, up to 100 characters. *It is very important that you do not change the DNS Name. Changing the DNS Name will cause you to lose the connection between Arena and the kiosk. Only change the DNS Name if you want to reset your kiosk and run the initial kiosk setup again. However, it is fine to edit the other fields.*
- **Default Check-In Theme** – Select a theme to use for the kiosk. A Theme is the display of the kiosk and includes the background image, the text, font and sounds. There are three default options.
- **Select Default Printer** – Select the printer to associate with this kiosk. *Be sure to configure the printer for the kiosk. There are additional options available such as, using a central printer.*
- **Printer Name** – Select an existing printer or specify a new printer for this kiosk. *The network printer name must match what you enter here.*
- **Location** – Select all Locations that you want connected to the kiosk. *Notice that the list is a tree view, listing the various Locations by Building, as in the setup example used in the Locations section in the **Check-In** chapter of this manual. Check the applicable boxes for this kiosk to run. A kiosk can have more than one location assigned to it, but it must have at least one location in order to function.*

- 3) Click **Update**.

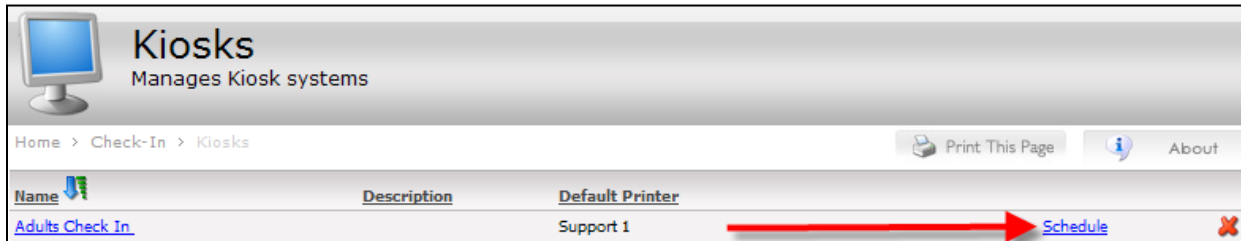
Kiosk Schedule

To the right of the kiosk name, you will see a [Schedule](#) link. Schedule is where you determine the schedule name, the start and end times the kiosk is available, and the type of Occurrence.

Steps to Create a Kiosk Schedule:

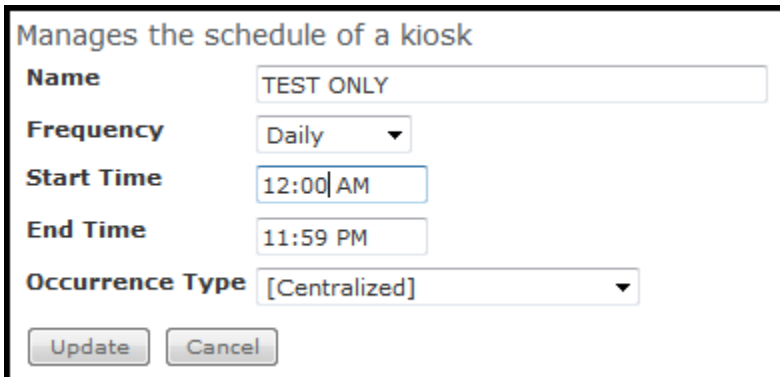
- 1) Click [Schedule](#) for the Kiosk you are creating.
- 2) Click the **Add New Schedule**  icon.

Kiosk Schedule



- 3) Complete the **fields** for this Schedule, as desired. *For testing purposes, consider setting a daily schedule, as shown below.*

Kiosk Schedule



- **Name** – Enter a name for this kiosk schedule such for Sunday services, special events or for testing.
- **Frequency** – Select the frequency for this kiosk. *Options are Daily, Weekly, Monthly, and One Time.*
- **Start and End Time** – Enter the start and end times this kiosk is to be available.
- **Occurrence Type** – Select the occurrence type. Options are Centralized (use this option to enable every Attendance Type tied to the Locations such as, using one kiosk for multiple classes) and Non-Centralized (use this option to select particular Attendance Type to use with this kiosk such as, using a specific kiosk for a class. Arena will prompt you to select the Attendance Type this kiosk will use).

- 4) Click **Update**.



If you need to delete a kiosk for any reason, delete all associated schedules first.

Locations

The Location page is where you create and edit a campus, building or room where people will check in such as Room 100 in the Fellowship Building on the Main Campus.

Check-In Locations

Physical Locations							
ID	Name	Building	Current Attendance	Printer Name	Max People	Room Closed	
5	Club 45	Laptop	17		20	Close Room	
2	For All Attendance Types	Laptop	4		0	Close Room	
3	Kids Camp	Laptop	0		0	Close Room	
1	Main Sanctuary	Fellowship Hall	0		0	Close Room	
4	Off Campus	Laptop	3		0	Close Room	

Page: 1 of 1 Page Size: 94 Refresh 5 Location(s)

Steps to Create a New Location:

- 1) Go to **Check-In >Locations**
- 2) Click the **Add** link, or if there are existing locations, click the Add New Location icon.
- 3) Enter all **desired fields**.

Locations

Physical Locations

Name

Sample Location

Update Image...

Campus

Campus 1

Update Small Image...

Building

Fellowship Hall

Room Closed

☐

Maximum People

0

☒ Include Leaders?

Select Printer

☐ New ☒ Existing

Printer Name

[No Printer]

Printer Description

Attendance Types

☒ dan's

☒ DW Category

☒ Passage Services

☒ Sunday School





☐ 10th Grade

- **Name** (Require)– Enter the name for this location such as Main Campus.
- **Campus** (Optional) – Select a campus, if using multiple campuses.
- **Building Name** (Optional) –Click the icon to add a building, if desired. *When you add a new building, it will be available for other locations.*
- **Room Closed** (Optional)– Select this box to close a room. *You can also edit this later or in the Check-In application.*
- **Maximum People** (Optional) – Enter the number of people you want to allow to check into this location such as, room occupancy. *If using room ratios, an occurrence with the location will automatically close when the maximum people check-in. You can set this value to “0” for no maximum.*
- **Attendance Type** (Required) – Select Attendance Type(s) you want to associate with the Location. *All active Attendance Type are available. You must select at least one Attendance Type.*

- 4) Click **Update** to save your settings.

From the Location List page, you can view all available locations, the number of current attendees, the associated printer and the maximum people for this location. To edit a location, including associated Attendance Types, click the location.

Location List

ID	Name	Building	Current Attendance	Printer Name	Max People	Room Closed
3	Kids Camp	Fellowship Hall	0		0	Close Room 
1	Main Sanctuary	Fellowship Hall	7		100	Close Room 
2	For All Attendance Types	Laptop	30		100	Close Room 
4	Off Campus	Off Campus	0		0	Close Room 
Page: 1 of 1 Page Size: <input type="text" value="127"/> <input type="button" value="Refresh"/> 4 Location(s)						


Attendance Type Categories

Attendance Types define the parameters of the ‘class’ the user is checking in to, such as the age or grade range. Each Attendance Type must have one or more frequency, which defines the specific time that attendance type is active. You can assign a group or tag to an Attendance Type, indicating that the occurrences created for the attendance type. Frequencies determine the availability of the Attendance Type. *An attendance type can only be associated with a single group or tag, but a single group or tag may have multiple attendance types assigned to it.*

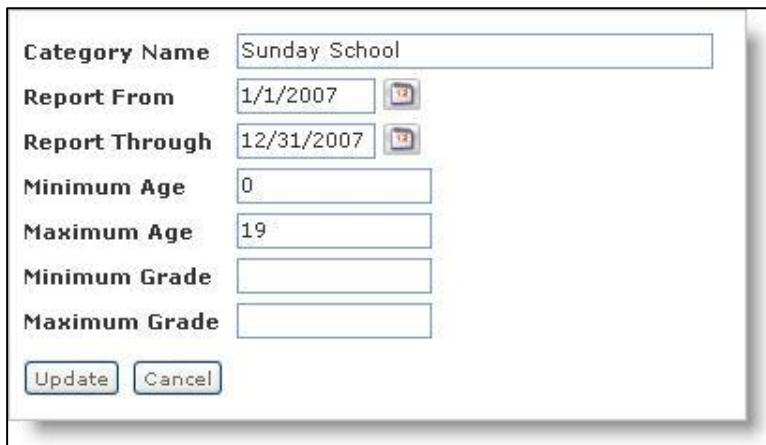


When managing a large number of attendance types, setting the frequencies and labels for each attendance type can be time consuming. Consider setting frequencies and labels at the Attendance Type Category level.

Steps to add an Attendance Type Category:

- 1) Go to Check-In → **Attendance Type Categories**.
- 2) Click the **Add New Attendance Type Category**  icon.
- 3) Complete available fields, as desired.


New Attendance Type Category



Category Name	Sunday School
Report From	1/1/2007
Report Through	12/31/2007
Minimum Age	0
Maximum Age	19
Minimum Grade	
Maximum Grade	

Update Cancel


- **Category Name** – Enter the name for this category.
- **Report Form** – Enter the begin date for this Attendance Type Category.
- **Report Through** – Enter the end date for this Attendance Type Category.
- **Minimum Age** – Enter the minimum age for this Attendance Type Category, if applicable. If there is not applicable age range, enter “0”. *You can use either Age or Grade, not both.*
- **Maximum Age** – Enter the maximum age for this Attendance Type Category, if applicable. If there is not applicable age range, enter “0”.
- **Minimum Grade** – Enter the minimum grade for this Attendance Type Category, if applicable.
- **Maximum Grade** – Enter the maximum grade for this Attendance Type Category, if applicable. *You can use either Age or Grade, not both.*

- 4) Click **Update** to save the settings. *Click on the Edit  icon if you need to change the details of a Category.*
You are now ready to create Attendance Types.

Attendance Type Categories

Attendance Type Categories									
Categories of Attendance Types									
Category Name	Report From	Report Through	Minimum Age	Maximum Age	Minimum Grade	Maximum Grade			
Sunday School	1/1/2008	12/31/2009	0	99	0	0	Labels	Frequency	Attendance Types
D/W Category			0	999	0	0	Labels	Frequency	Attendance Types
dan's			0	0	0	0	Labels	Frequency	Attendance Types
Passage Services	1/1/2010	12/31/2010	0	99	0	0	Labels	Frequency	Attendance Types
Page: 1 of 1 Page Size: 158 Refresh 4 Attendance Type Category(s)									



To delete an Attendance Type, you must first delete all associated Occurrences, Labels and Frequencies. Then click the **Delete**  icon.

Attendance Type Category Metrics

Click an [Attendance Type Category](#) to display metrics for Check-In. You can also select an Additional Charts to view Metrics for a specific Attendance Type.

Attendance Type Category Metrics




Attendance Types

Attendance Types refer to the different people checking. Attendance types define the parameters of the ‘class’ the user is checking in to, such as the age or grade range. You can assign an Attendance Types to a group or tag. *An attendance type can only be associated with a single group or tag, but a single group or tag may have multiple attendance types assigned to it.*

Each attendance type must have one or more frequency, which defines the specific time that attendance type is active. *The frequency/frequencies of an attendance type are separate from the kiosk’s schedule(s) and define when the attendance type is active on all kiosk. Frequencies are used by the Create Occurrences Agent to automatically create occurrences for any attendance types that do not already have existing occurrences for the specified times.*

Steps to Create a New Attendance Type:

- 1) Click the **Add** link to create a new Attendance Type. *For additional Attendance Types, click the Add New Attendance Type  icon.*
- 2) Complete all fields, as desired.

New Attendance Type

Types of occurrences that can be used by the check-in stations.

Category Passage Services ▼

Name Weekend Service

Active ☒

Minimum Age

Maximum Age 99.000

Age Range Text

Minimum Grade [none] ▼

Maximum Grade [none] ▼

Minimum Birth Date

Maximum Birth Date

Check-In Theme [Use Kiosk Default] ▼

Location Specific Occurrences ☒

Weekend Service ☐

Merge Occurrences For Day: None ▼

Link With Tag (not set) ...

Default Source [Use System Default] ▼

Default Status [Use System Default] ▼

Link With Group Level [none] ▼

Link With Specific Group [none] ▼

Membership Required for Check-In ☐

Secured ☒

Gender Preference Everyone ▼

Pager Required ☐

Use Room Ratios ☐

Leader Tags (not set) ...

People per Leader 0

Minimum Leaders 0

Maximum People (This value is defined on the 'Location')

Locations ?

Format: "Building - Location (max)"

Available

- Campus 1Building Q - Bartlett Check In (0)
- Campground - Ye Ole Campground in the
- Campus 1Fellowship Hall - Sample Locati
- Jones Hall - Nursery (0)

Selected

> <








Move Up **Move Down**

Update **Cancel**

- **Name** – Enter a name for the Attendance Type. *This will display at Check-In.*
- **Active** – Mark if the Attendance Type is active.
- **Minimum/Maximum Age** – Enter a minimum and maximum age for this Attendance Type, if desired.
 - *Setting the age range to 0-0 will ignore ages.*
 - *Setting the age range to any other range would require all records checking in to have a complete date of birth (MM/DD/YYYY).*
 - *Use “.99” to end the age range. If your age range is 6 to 7 year olds, enter 7.99 to include ALL 7 year-olds. Enter “0.5” for 6-months old.*
- **Age Range Text** – Enter the field name of the Age Range text, if desired. Examples might be “six-months of age” or “crawlers”.
- **Minimum/Maximum Grade** – Enter the minimum and maximum grade for this Attendance Type, if desired. *You can use Age or Grade, not both.*
- **Minimum/Maximum Birth Date** – Enter MM/DD/YYYY for situations such as classes for children of less than 6-months in age and children ages 6-months to 1 year of age.
- **Check-In Theme** – Select a theme. *Leave it at [Use Kiosk Default] if you are not using a kiosk. Otherwise, choose which theme you want to use for this Attendance Type.*
- **Location Specific Occurrence** – Select this option if you have multiple kiosks that utilize the same Attendance Type in order to get information specific to that kiosk. *If it is not checked, then you get totals across all kiosks when viewing Total Attendees.*
- **Weekend Service** – Select this box to populate the attendance history graph on the person detail page.
- **Merge Occurrences for the Day** – Select a day if you have multiple occurrences within the same day. *The attendee total combines across all occurrences. If set to “none”, the attendance will show separately for every occurrence for the Attendance Type. If it is set to any day of the week, Arena will merge all occurrences for the Attendance Type, for the week into a single representation on that selected day.*
- **Link with Tag/Group Level/Specific Group** – Select a Tag or Group, if desired. By selecting a specific Tag or Group, Arena records occurrences for your Tags or Groups. *If you plan to use a Specific Group, you must choose the Parent Group under Link with Group Level. If using manual attendance for multiple groups or tags, it is not necessary to select a Tag or Group.*
- **Membership Required** – Check to require only Members to check in to the specified class/group. *All people must be in the Group and will not be available for Family Registration (visitors).*
- **Secure** – Check this box if occurrences of this type will only be available to non-centralized kiosks. *This is only available for the Kiosk when in Non-Centralized mode.*
- **Gender Preference** – Use this to limit records to a specific gender type.
- **Pager Required** – Select this if you are using pagers at time of Check-In or would like to identify people by a manually entered code.
- **Room Ratios** – Select this box to open and close occurrences based on the number of people checked in. for this attendance type.
 - **Leader Tag** - This identifies people from Tags that are eligible to check in as leaders of the class.
 - **People per Leader** – Enter the number of people who can check in for every leader who checks in.
 - **Minimum Leaders** – Enter the minimum number of people that can check in before the class opens. If set to “0”, then the next class (if available) will automatically open, if one fills up.
 - **Maximum People** – Enter the maximum people or define this value in Locations.
- **Locations** – Select the locations for this Attendance Type.

- 3) Click **Update** to save your settings.

Attendance Type List

Name	Minimum Age	Maximum Age	Minimum Grade	Maximum Grade	Minimum Birth Date	Maximum Birth Date	Age Text	Location Specific	Weekend Service	Display Photo	Merge Day				
Crawlers		99.990					Babies					Occurrences	Frequency	Labels	  
Toddlers	2.000	99.990					Toddlers					Occurrences	Frequency	Labels	  

Click the [Name](#) of the Type to edit.

- 4) Repeat this process if you have other Attendance Types for this Category.




You can delete Attendance Types and Attendance Type Category that do not have occurrences.

Frequency

Frequency is the time(s) that the Attendance Type is available for Check-In, and the actual meeting times of the Attendance Type. For example, if a group meets from 9:00 a.m. to 10:30 a.m., you can create a Frequency for 8:30 a.m. to 9:30 a.m. *You can create multiple frequencies for an attendance type, if desired.*

Steps to Create a Frequency:

- 1) Click the **Add** link to create the first frequency for a type, or click the **Add New Frequency**  icon to add an additional Frequency.
- 2) Complete all fields.



The screenshot shows a web form for creating a frequency. It includes the following fields and controls:

- Name:** A text input field containing the word "Sunday".
- Frequency:** A dropdown menu with "Weekly" selected.
- Day of the Week:** A dropdown menu with "Sunday" selected.
- Start Time:** A time input field containing "9:00 AM".
- End Time:** A time input field containing "10:30 AM".
- Check-In Start Time:** A time input field containing "8:30 AM".
- Check-In End Time:** A time input field containing "9:30 AM".
- Buttons:** "Update" and "Cancel" buttons at the bottom left.

Name – Enter the name for the frequency.

Frequency – Select the applicable regularity for the Attendance Type. *If you select Weekly, select the Day of the Week. If you choose Monthly, select Day of the Month. If you select One-Time, enter the specific date. For testing purposes, consider creating a Daily frequency.*

Start/End Time – Enter the start and end times for the actual meeting or class. *For testing purposes, consider 08:00am-05:00pm start/end times.*

Check-In Start/End Time – Enter the start and end times attendees can check-in for this Attendance Type.

- 3) Click **Update**.




Create at least one Frequency for each Attendance Type to be available at the Kiosk.

For the kiosk to properly function and record occurrences, make sure that the Frequency is accurate for the Type, and that the Schedule encompasses the Check-In times established for the frequency.

Labels

Labels are the printed receipts for Check-In for an Attendance Type or Attendance Type Category.

 Check-In has the ability to print one set of labels for a person who is checking into multiple Classes at once. The Classes have to be set up to print this type of label.

Steps to Select a Label:

- 1) Click the **Add New Label**  icon to select a label.

Labels



The screenshot shows a dialog box titled "Labels". It has the following fields and controls:

- Report Name:** A dropdown menu with "ChildTag" selected.
- Select Printer:** Two radio buttons, "New" and "Existing", with "Existing" selected.
- Printer Name:** A dropdown menu with "[Use Kiosk's Default Printer]" selected.
- Printer Description:** A text field.
- Print Landscape:** A checkbox that is checked, with the text "(labels are typically printed landscape)" next to it.
- Buttons:** "Update" and "Cancel" buttons at the bottom.

- **Report Name** – Select the desired label for this Attendance Type or Attendance Type Category.
- **Select the Printer** – Select to use the Default printer setup for the Kiosk or a different printer.
- **Print Landscape** – Select the format to which the label should print.

- 2) Click **Update**.

Sample Default Labels


Attendant Child Receipt

JF2	Jesse Blackwell Fellowship Hall Main Sanctuary Daily 12:01 AM
	Notes:

Child Tag

JF2	
Fellowship Hall Main Sanctuary Daily 12:01 AM	
Jesse Blackwell	

Parent Child Receipt

JF2	
Child Pick-Up Receipt For the safety of your child, you must present this receipt when picking up your child.	
Fellowship Hall Main Sanctuary Daily 12:01 AM	
Jesse Blackwell	

Occurrences

Occurrences are attendance dates for events within Arena. Click on the [Occurrences](#) link to view a list of occurrences recorded for this type. *The Check-In kiosk application will ONLY recognize the occurrences that are open for specific dates.*

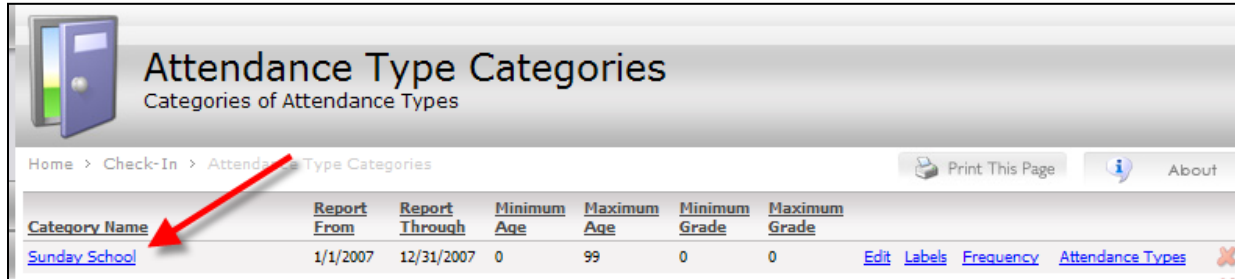
Occurrences

Name	Attendance	Start	End	Location	Missions Related	Notes	Closed
Sunday School	0	09/26/07 12:00 AM	09/26/07 11:59 PM				Close Occurrence
Page: 1 of 1 Page Size: 75 Refresh 1 Occurrence(s)							

Check-In Reporting

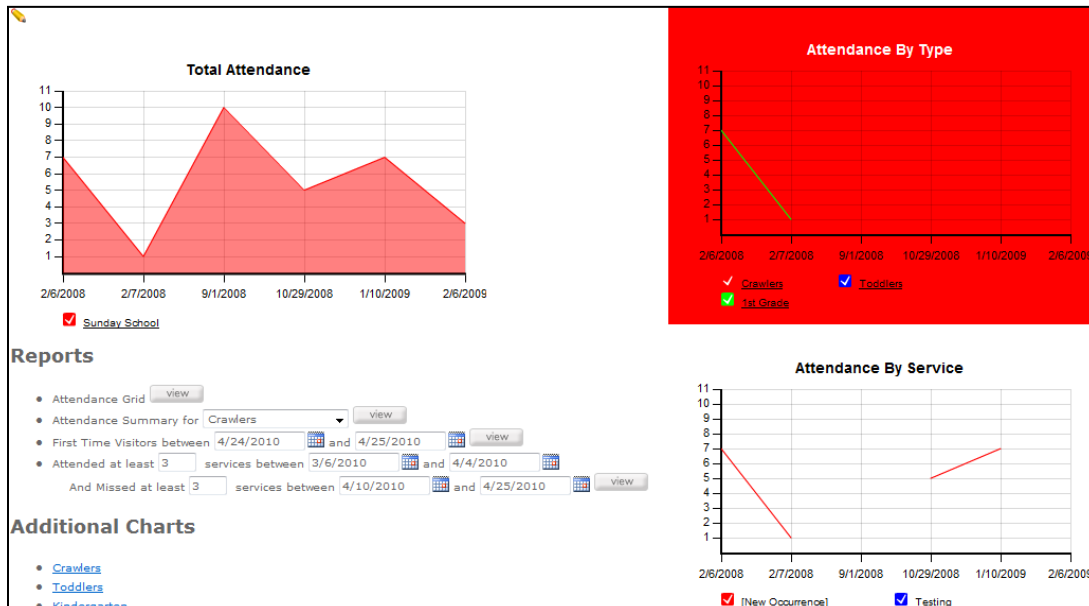
You can access Attendance reporting by clicking the name of the [Attendance Type Category](#) on the Attendance Type Category page.

Attendance Type Categories







Category Name	Report From	Report Through	Minimum Age	Maximum Age	Minimum Grade	Maximum Grade	
Sunday School	1/1/2007	12/31/2007	0	99	0	0	Edit Labels Frequency Attendance Types

Attendance Type Category Reports



- **Attendance Grid** – Displays a grand total of attendees per class. Clicking on the number will display the records of those who were present.
- **Attendance Summary for** – This will display a grid of the dates this Attendance Type Category met, and the attendance records of the members.
- **First Time Visitors** – Displays the records where the first visit date falls between the date ranges.
- **Missed at least** – Displays the records meeting the supplied criteria.
- **Attended at least** – Displays the records meeting the supplied criteria.


Location List

ID	Name	Building	Current Attendance	Printer Name	Max People	Room Closed
3	Kids Camp	Fellowship Hall	0		0	Close Room 
1	Main Sanctuary	Fellowship Hall	7		100	Close Room 
2	For All Attendance Types	Laptop	30		100	Close Room 
4	Off Campus	Off Campus	0		0	Close Room 
Page: 1 of 1 Page Size: <input type="text" value="127"/> <input type="button" value="Refresh"/> 4 Location(s)						

Monitor

The Monitor page displays current active Check-In Locations. From this page you can see the number of attendees for each Occurrence (Class), the leaders checked (if you using Room Ratios), the available seats (if using Room Ratios), the start and end times of the Occurrence, and the Location.



Monitor Page



Monitor

Monitor Current Active Check-In Locations.

Home > Check-In > Monitor

 Print This Page  About

Occurrences

Class Name	Attendees	Leaders	Available Seats	Start	End	Location	
Nursery	0	1	5	6/25/2009 12:00 AM	6/25/2009 11:59 PM	For All Attendance Types	View Occurrence
5th Grade	0			6/25/2009 12:00 AM	6/25/2009 11:59 PM	Kids Camp	View Occurrence
Adult Group Check-In	0			6/25/2009 12:00 AM	6/25/2009 11:59 PM	For All Attendance Types	View Occurrence
Adult Group Check-In	1			6/25/2009 12:00 AM	6/25/2009 11:59 PM	Main Sanctuary	View Occurrence
Coneheads 8:00am	0			6/25/2009 8:00 AM	6/25/2009 8:30 AM	For All Attendance Types	View Occurrence
Coneheads 9:30am Service	0			6/25/2009 9:00 AM	6/25/2009 10:15 AM	For All Attendance Types	View Occurrence
Coneheads: 8:00am Service	0			7/13/2008 12:00 AM	7/13/2008 11:59 PM	Main Campus	View Occurrence
Daily	0			6/25/2009 12:01 AM	6/25/2009 11:59 PM	For All Attendance Types	View Occurrence
Nursery	0	0	0	6/25/2009 12:00 AM	6/25/2009 11:59 PM	For All Attendance Types	View Occurrence


Click the [View Occurrences](#) to view the details of the Occurrence and a list of the people currently checked in.

Occurrence Detail

Monitor

Monitor Current Active Check-In Locations.

[Home](#) > [Check-In](#) > [Monitor](#)

 [Print This Page](#)

[About](#)

Occurrences

<u>Class Name</u>	<u>Attendees</u>	<u>Leaders</u>	<u>Available Seats</u>	<u>Start</u>	<u>End</u>	<u>Location</u>
[New Occurrence]	0	0		1/10/2009 7:00 PM	11/21/2009 11:00 PM	Jones Hall - Nursery

Page: 1 of 1 Page Size:

Attendees

<u>Name</u>	<u>Check-In</u>	<u>Check-Out</u>	<u>Security Code</u>	<u>Notes</u>
Administrator, Stewie		3/2/2009 2:50 PM		
money, bensteins		6/12/2009 1:25 PM		Created by batch processing
Smith, Bud	4/24/2009 10:40 AM	4/24/2009 10:41 AM	GZX	
Smith, "Bill"	4/1/2009 3:25 PM	4/1/2009 3:28 PM	SXH	

Click [View Occurrence](#) to view the details of that occurrence and to modify individual attendance.

View Occurrence

Attendance Type [Any Class](#)

Name [New Occurrence]

Location Main Campus

Area [Riverwood Farms](#)

Start Time 2/15/2011 12:00 AM

End Time 2/15/2011 11:59 PM

Check-In Location Main CampusLaptop - Club 45


Check-In Start Time 1/1/2011 12:00 AM

Check-In End Time 12/31/2011 11:59 PM

Membership Required for Check-In No



Occurrence Closed No

Head Count 0

 **First Name**

Last Name

Status

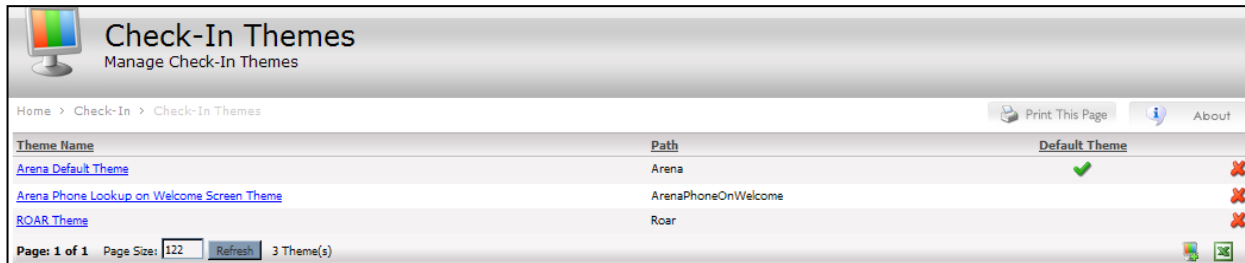
	Address	Check-In	Check-Out	Attended	Notes
Adams, Laura	1740 Meadow River Cv Cordova, TN 38016-1603	2/16/2011 9:22 AM		<input checked="" type="checkbox"/>	<input type="text"/>
 Clem, Sam	1921 Winding Ridge Trl Knoxville, TN 37922-7113	9:45 PM		<input checked="" type="checkbox"/>	<input type="text"/>
Cox, Doug	7345 Goodlett Farms Pkwy Cordova, TN 38016-4990	5/25/2011 10:20 AM		<input checked="" type="checkbox"/>	<input type="text"/>
 dos, Johnny	7345 Goodlett Farms Pkwy Cordova, TN 38016-4990	4/12/2011 4:04 PM		<input checked="" type="checkbox"/>	<input type="text"/>

Page: [1](#) [2](#) [3](#) [4](#) [5](#) of 5 Page Size: 17 Item(s)

Check-In Themes

A Check-In Theme is the display of the kiosk, including the background image, the text, font and sounds. There are three default themes. You can select a theme for each kiosk. If desired and have the applicable permissions, can select a custom theme.

Check-In Themes



Steps to Change Themes:

- 1) Click on the **Add New Theme**  icon on the Check-In Themes page.

New Theme



- 2) Enter the **Theme Name**.
- 3) Enter the **Path**. *See your Arena Administrator for this information which pertains to the location of the custom theme, if applicable.*
- 4) Select whether to use this theme by **default** for all Attendance Types.


Theme Details

Theme Name	Arena Phone Lookup on W
Path	ArenaPhoneOnWelcome
Default Theme	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

- 5) Click **Update**.

Check-In Implementation

This section covers the setup and operation of Arena's R.O.A.R. (Rapid Online Automated Registration) Check-In. For ease of use, R.O.A.R. is for using with a touch-screen system, but a standard monitor will work, using a mouse for input.

 For this discussion, we assume you are using a touch-screen.

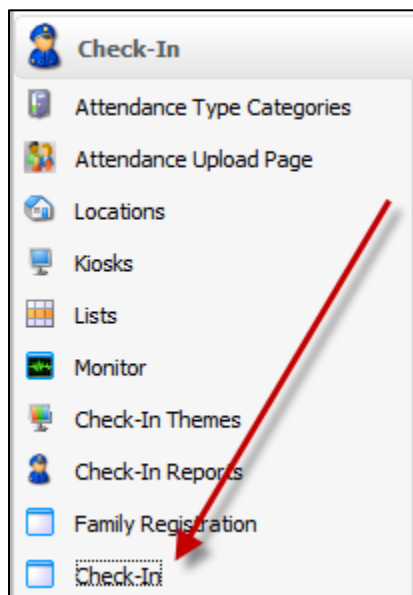
INITIAL STARTUP AND CONFIGURATION

The first time you run this application on the kiosk, you will have to set up the Location, Attendance Type Category, and Mode. This is a one-time setup; unless you change kiosk DNS in the kiosk settings under Check-In.

Steps to Launch and Configure Check-In:

- 1) Click **Check-In**.

Check-In Launch Page



- 2) Click **Select All** or **Select Locations**. *These are the Locations as set up in Check-In within Arena. You can change these settings later under Check-In → Kiosks by opening the corresponding kiosk in Arena.*

Kiosk Locations

- 3) Click **Finished**.
4) Select the **Check-In Mode**.

Kiosk Mode

- **Centralized** – Use this option to enable every Attendance Type tied to the Locations to check in. *Use this option if you are using one kiosk for multiple classes.*
- **Non-Centralized** – Use this option to select particular Attendance Type to use with this kiosk. *Use this option if you are using a kiosk for each class. Arena will prompt you to select the Attendance Type this kiosk will use.*
- **Use Schedule** – Use this option to narrow check-in even further.

- 5) From this screen, attendees can scan a Check-In card for themselves or their family, or they can use the Manual Check-In option to use the Phone Lookup.

Check-In. Main Page



CHECK IN APPLICATION

Once you run the Check-In application members can check into the available Attendance Types.



- Be sure to review Check-In Application Settings prior. For example if you want to allow Family Members to be Pre-selected or Must Manually Choose Family Members (This determines whether to scan a Member's entire family or not.), and if classes are preselected.
- If you are using Arena Check-In and would like to allow non-family members to Check-In one another, your Administrator can create a Relationship containing the phrase "can checkin" (case insensitive, no quotes) that will permit this action.

Centralized Mode

When a member scans a member card or checks in, Arena will display a list of the family members associated with the person whose card is used and whom are eligible to Check-In. Arena will display a page of family members and those records with a relationship type or "can checkin".

Arena will display the "best fit" class(es) for this person, based on what classes are currently open, what classes allow check in at this time, the person's age, and gender. You can establish these parameters in the Attendance Types Categories and Attendance Types.

Check-In Family Page

The screenshot displays the 'Check-In Family Page' interface. It features five family member cards arranged in two rows. Each card includes a green checkmark icon, the member's name, the text 'is checking into...', a silhouette of the member, and a 'Choose Classes...' button. The members are Donna, W F, Robin, Mary, and Debbie. At the bottom of the page, there is a large green arrow pointing left, a status indicator showing '5 out of 5 selected', and a 'Check In' button with a green checkmark.

Once John selects his class, he then presses the white “Check In” box to check into the class, as shown below. A receipt will print for him, providing the printer is set up and the Label has been configured.

Confirm Class




He is then taken back to the family list, where he presses Jimmy’s name to Check In, and he receives the page shown below to confirm Jimmy’s Check In.

Check-In Confirmation



Notice Arena automatically places John and Jimmy into different classes. When John pressed his own name, the class selection page came up with his two class choices Couples and All Attendees. For Jimmy, who is 5 years old, the Kindergarten class comes up, as it is set to allow ages 5-6.

If John accidentally presses the wrong person, he can press the green  arrow to go back. Since he wants to check in Jimmy, John now presses Check In to check Jimmy into the Kindergarten class. A receipt prints out, and he is redirected again to the family list, as shown on the following page.

If John wanted to check into a different class, and another class was available that this kiosk was set up to use, John would get the following page:

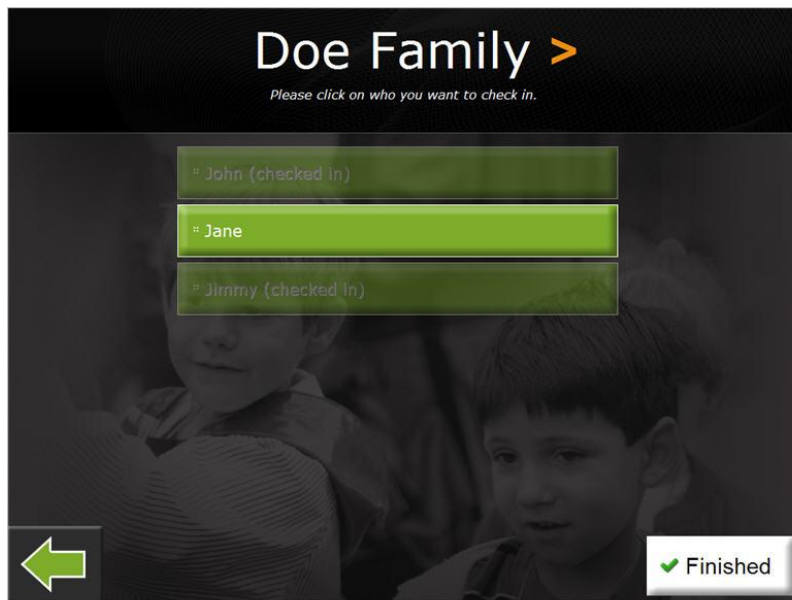


Notice that now, the Change button is active. When John presses Change, he sees the following:



In this scenario, John can check into All Attendees, instead of Couples. John would see a new Confirmation page, and can now complete the check in process.

Family Page



Notice that John and Jimmy are grayed out and “(checked in)” displays next to their names. If John is done checking people in, he presses Finished or he can check in someone else.

NON-CENTRALIZED MODE

Non-Centralized Mode



Using Non-Centralized mode will only allow you to check into one Attendance Type at this kiosk. The Main page will look similar, but the bottom left corner will show the Attendance Type, the Location, and the current number of people checked into the Class.

In this example, the kiosk is set up for Kindergarten, which is in the Bartlett Check-In Location. In the Doe family, only Jimmy is eligible for the Kindergarten Attendance Type. When John scans his barcode or looks up his family using the Manual Lookup, Jimmy automatically checks in.

If John has multiple family members who are eligible for a Type, a page displays from which he can choose all or only those family members to check in, as shown on the following page.

Family Page

The screenshot displays the 'Family Page' interface, which allows a user to check in multiple family members simultaneously. The page is divided into three vertical columns, each representing a family member: Andy, Bea, and Opie. Each column contains a small photo of the person, their name, and the text 'is checking into...'. Below this, there are three rows of check-in options, each starting with '12:00 AM'. The options for Andy and Bea are: 'Any Class (Attendance Chlid Receipt) (Main Campus)', 'Guest Services (Main Sanctuary)', and 'Men's Bible Study (Off Campus)'. The option for Opie is: 'All Children (For All Attendance Types)'. At the bottom of each column is a button labeled 'Change Classes...'. The background of the page is dark with a faint image of a child's face.

Family Member	Check-in Time	Check-in Option	Action
Andy	12:00 AM	Any Class (Attendance Chlid Receipt) (Main Campus)	Change Classes...
	12:00 AM	Guest Services (Main Sanctuary)	
	12:00 AM	Men's Bible Study (Off Campus)	
Bea	12:00 AM	Any Class (Attendance Chlid Receipt) (Main Campus)	Change Classes...
	12:00 AM	Guest Services (Main Sanctuary)	
	12:00 AM	Men's Bible Study (Off Campus)	
Opie	12:00 AM	All Children (For All Attendance Types)	Change Classes...

John would click Finished when he has chosen the correct family member(s). This will check them in and print out the receipt(s).

CHECKING OUT

The receipt, if designed properly, can include a Check Out barcode. To check someone out, simply scan that receipt while at the main page. The page displays a message stating the person is checked out. You can also check someone out while in the Check-In Management Page, as shown in the next section.

Manually Check Out

All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Sample, Jane																										
Member Status: Member													Checked In: 8:54 PM													
Age: 42													Building: Laptop													
Gender: Female													Location: For All Attendance Types													
Date Added: 6/15/2009													Pager:													
<div>Re-Print Check Out Verify</div>																										
<div>Back 1 person (last name starting with 'S') in 12:00 AM Test Small Group (Main Campus)</div>																										

CHECK-IN MANAGEMENT PAGE

If a person has an Alternate ID, the barcode will open the Management Page. Alternatively, if you have a keyboard attached to your kiosk, you can type the Manager ID number and press Enter. You will not see the number display on the page, but it will allow access to the Management page.



Press Ctrl+M to open the Check-In Management page.
Press Finished to return to Check-In.
Press Exit to close Check-In.

Kiosk Management Page

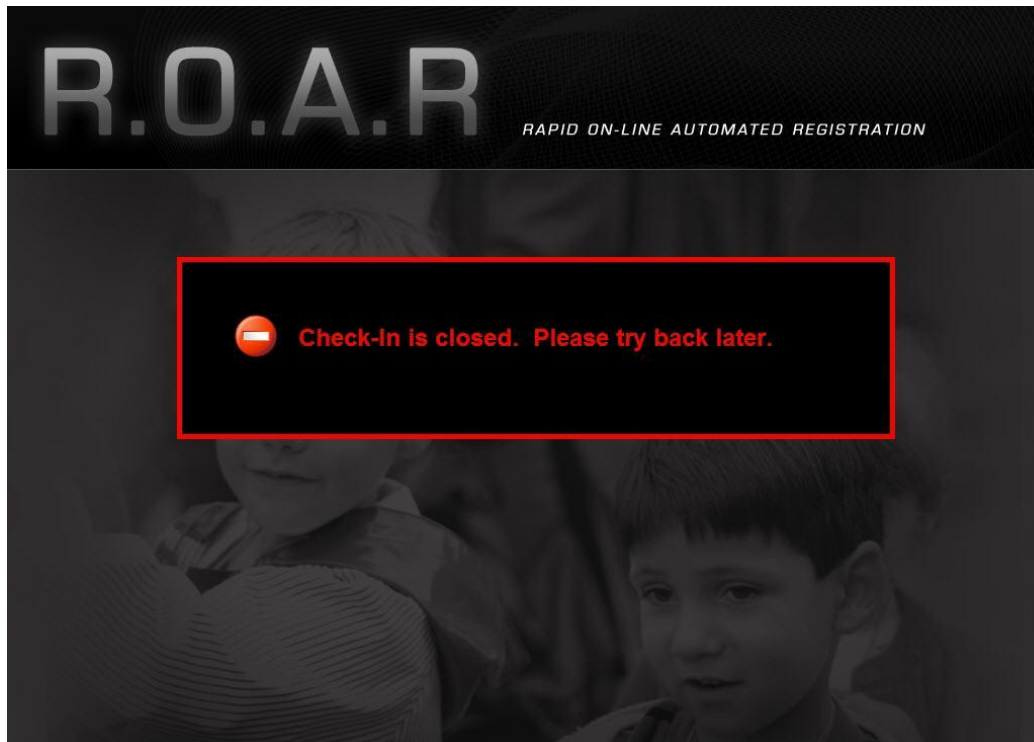
- **Add/Remove Locations** – Use this button to change locations and associated attendance types for this kiosk.
- **Open/Close Locations** – Use this button to manually close or open a location using this kiosk.
- **Change Modes** – Use this button to change the mode of this kiosk to Centralized or Non-Centralized. You can use Kiosk Schedule to reset back to the Schedule Settings, removing any temporary changes made to the Kiosk.
- **View Attendees** – Use this button to view and verify attendees, reprint labels, and to check out attendees.
- **Print Attendees** – Use this button to print attendees.

Feature Available in Non-Centralized Mode:

- **Print Attendees** – Use this button to print a list of all people who are currently checked into this class.
- **Display Random Attendees** – Use this button to display a random list for people who are currently checked in for giveaways, drawings, etc. Press the number to the right to select how many people to display.

If this kiosk has no open Location, the below screen will display.

Closed Check-In



SCANNING A BARCODE WITHIN THE MANAGEMENT PAGE

If you scan a barcode of someone while in the Management Page, it displays a list of the family members so that you can check any/all out. Click verify for a list of people who are authorized to check out the child, or print a receipt for each person. Press the “Back” button to exit this page.

Scanning a Barcode

The screenshot shows a software interface for managing members. At the top, there is a horizontal row of buttons labeled with letters from A to Y, plus an 'All' button. Below this, the name 'Doe, Jon' is displayed. Underneath the name, there are two columns of member information: 'Member Status: Member', 'Age: 32', 'Gender: Male', and 'Date Added: 8/3/2000' on the left; and 'Checked In: 2:45 PM', 'Building: Worship Building', and 'Location: East Hall' on the right. To the right of this information are three buttons: 'Re-Print', 'Check Out', and 'Verify'. A vertical scrollbar is on the right side of the main content area. At the bottom left, there is a 'Back' button. To the right of the 'Back' button, it says '1 person'.

Member Information		Actions	
Doe, Jon			
Member Status: Member	Checked In: 2:45 PM	Re-Print	Check Out
Age: 32	Building: Worship Building	Verify	
Gender: Male	Location: East Hall		
Date Added: 8/3/2000			

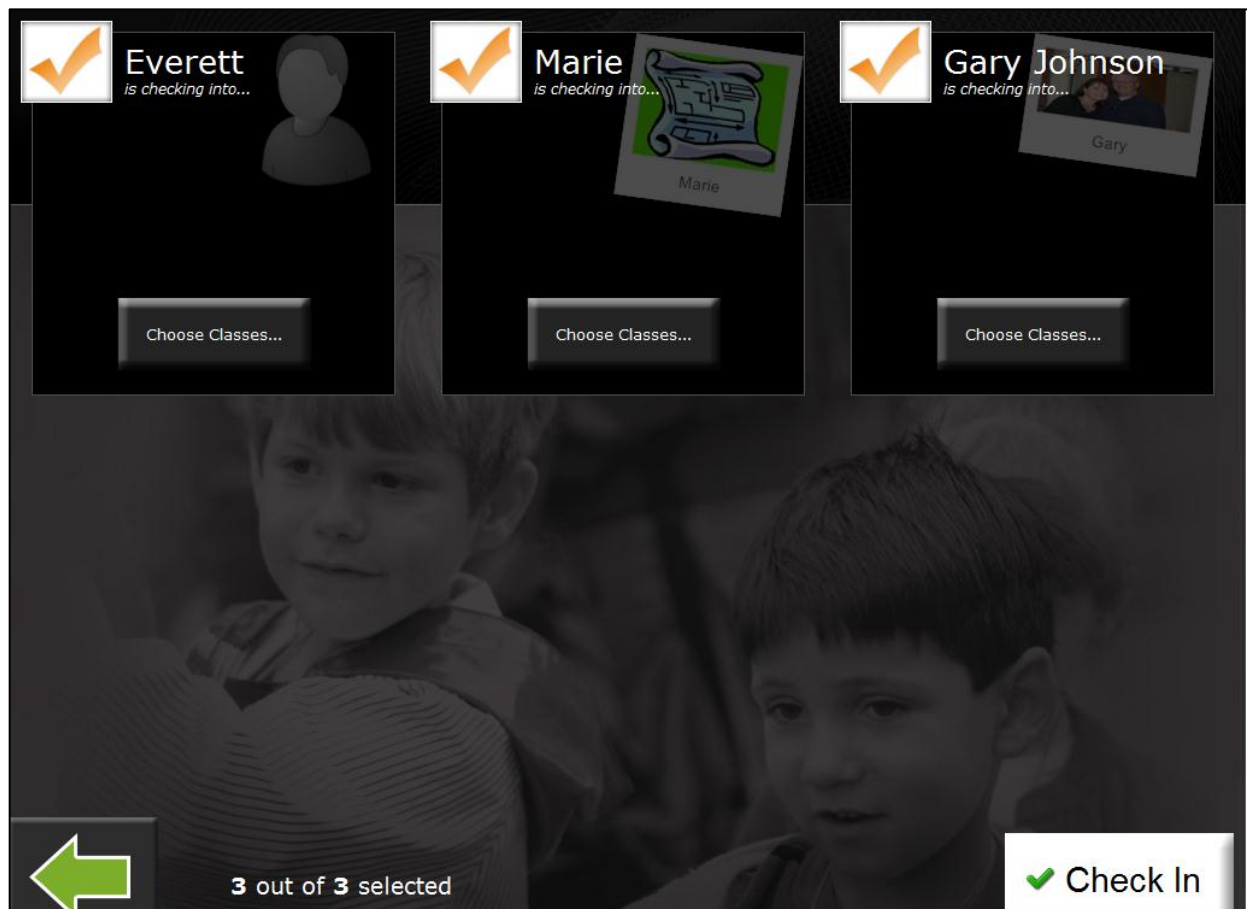
Back 1 person

Click **Back** to exit the management screen and return to the kiosk Main Page.

Press Exit to close the application entirely. *(Alternatively, pressing Alt+f4 at any time in the application will close the application entirely. For this reason, we do not recommend having an accessible keyboard attached to a non-attended kiosk)*

Using Relationship with Check-In

On the Check-In screen, individuals can check other people who have been identified on their record with a relationship type that includes "can checkin" (no quotes). Arena identifies those individuals by displaying the full name on the check-in screen.




TROUBLESHOOTING

The Kiosk is inactive

The kiosk application will display the following screen if there is not a schedule set to run on the Kiosk at this time. Edit the Kiosks' schedule to correct this if this screen displays during needed Check-In times.

Kiosk Troubleshooting

 This kiosk's schedule is not currently active.

<u>Schedule Name</u>	<u>Frequency</u>	<u>Event Type</u>	<u>Start Time</u>	<u>End Time</u>
Kyle Kiosk	Every Tuesday	Today	5:00 PM	5:38 PM
The Always Kiosk	Daily	Central Check-In	5:45 PM	7:30 PM
The Grind	Daily	Central Check-In	7:00 AM	2:00 PM

Last checked at 02:42:43 PM. Checking again in 45 seconds...

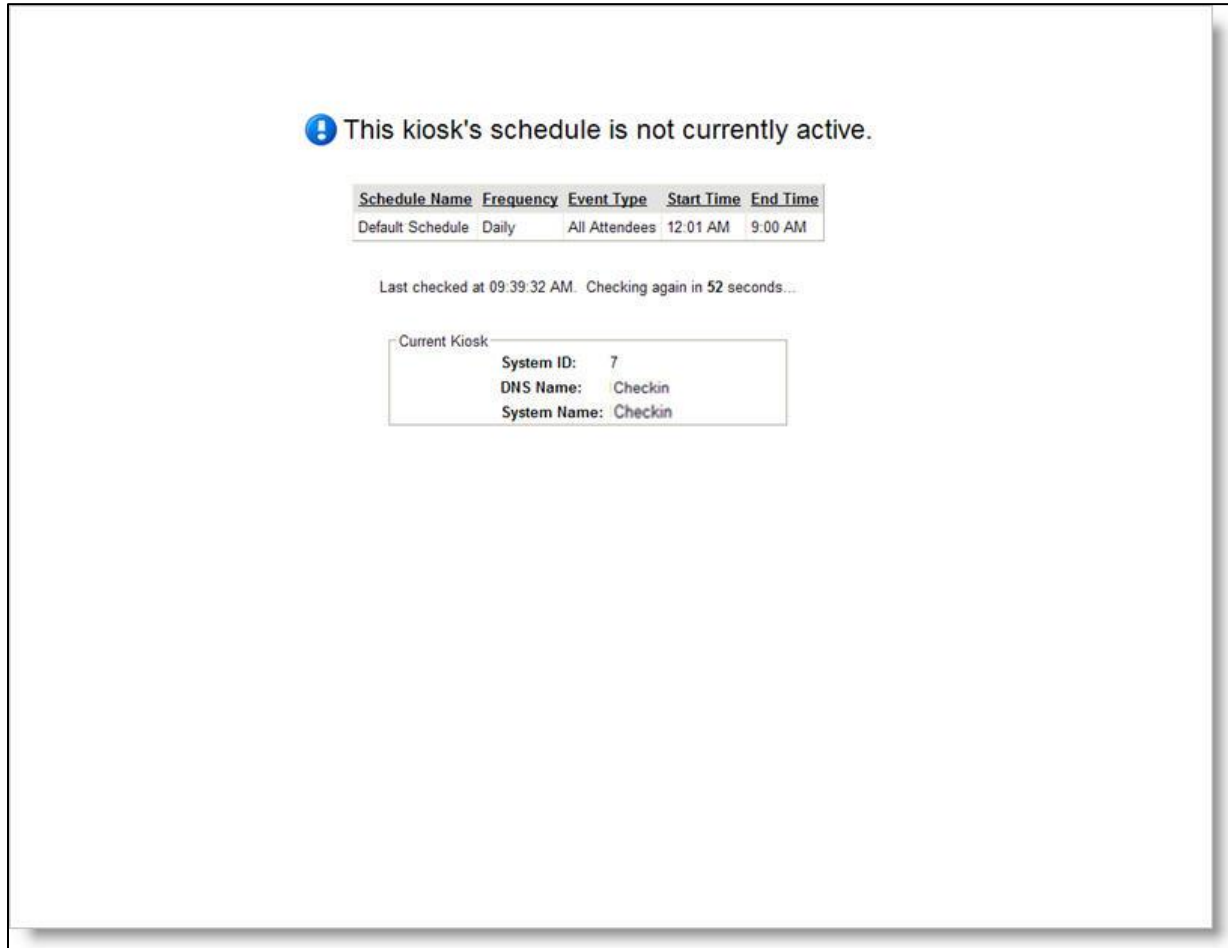
Current Kiosk

System ID: 175
DNS Name: kylebxp.shelbyinc.com
System Name: KYLEBXP

If the Kiosk is Closed

If the Kiosk is currently closed, (the current time of the Arena Server is outside of the Kiosk Schedule time); you cannot use it for Check-In. You may enter the Management Page only by pressing Ctrl+M on the keyboard, as the barcode reader is disabled during this time. To enable the kiosk, edit the Schedule from within the Check-In area of Arena.

Closed Kiosk



No Classes are available

The following screen (name will be changed for whoever is attempting to check in) will show for various reasons, but usually a setting in the Attendance Types or the individual's record is the culprit. Following are things to check for troubleshooting this message.

Class Not Available



Issue: The Attendance Type is for a specific gender, male or female.

Fix: Check the gender option for the Attendance Type. If not all records are properly associated with the selected gender, change the gender to “Everyone”.

Issue: Age Range is set for The Attendance Type.

Fix: Be sure the person checking in has a complete date of birth.

Fix: Remove the age range from the Attendance Type or enter a complete date of birth on the person's record.

Issue: The person's current age does not fall into the Age Range of any Attendance Types.

Fix: Go to the Kiosk Management Screen in the Check-In application and select a Location that has an Attendance Type that has the age range of this person.

Fix: Go to Check-In>Locations in the Arena Application and select an Attendance Type that has the desired age range.

Issue: The Attendance Type the person is eligible for has the Secured box selected, but the kiosk is running in Centralized mode.

Fix: If you intend to use the Attendance Type not as previously described, uncheck the selection Secured on the type.

Fix: Change the Kiosk to Non-Centralized and choose the Secured Attendance Type for it.

Issue: There are no Attendance Types where the Frequency at this Check-In time is currently available, and an existing Occurrence has already ended.

Fix: Edit the frequency of an Attendance Type, so that Occurrences are available for the appropriate time range.

If this needs to be changed immediately, edit the Occurrence by going into Check-In > Attendance Type Categories > Attendance Types > Occurrences and change the End Time.

Issue: All Occurrences for the current time are Closed (Arena v2.0 and later).

Fix: Open an Occurrence. Or create a new Occurrence record.

Issue: Classes are available, but Membership is required

Fix: Connect the person to the tag/group.

Fix: Uncheck the Membership Required selection for Check In.



Contributions

Arena's Contributions feature allows you to manage your organization's Online Giving. You can set up for your organization to receive gift payments via Credit Card and ACH (Automated Clearing House). If using Shelby Financials, you can export batches to Shelby v5 Contributions or directly to Shelby v5 General Ledger.

Fund Management


In order to categorize your giving, you must set up Funds (comparable to Shelby v5 Purposes) to manage them. In order to accept Online Giving, you must have at least one fund set up in Arena.

If you are using Shelby v5 Financials and would like for the Shelby v5 Funds available, see your Arena Administrator.



If this is the first time you have opened **Fund Management** and the Shelby v5link is established, a prompt will display asking you to choose a v5 Company. By selecting your organization name from the drop-down list and clicking the **Apply** button your active Shelby v5 funds will be available. *Note that Arena can only connect with one Shelby v5 Company, so you cannot use Purposes from multiple v5 Companies.*

Steps to Create a New Fund:

- 1) Go to Contributions → Fund Management.
- 2) Click the Add link to create a new fund, or if funds already exist, click the Add New Fund  icon.



When connected to Shelby v5, a checklist of active purposes display, listing all purposes not already in use in Arena. Use the Checkboxes to choose which purpose to tie to this fund, and click **Update**. *Note that while it is possible to have both Shelby v5 funds connected to Arena we strongly recommend against this practice due to the synchronization issues this situation creates.*

Fund Management

Fund Management						
Fund Manager						
Home > Contributions > Fund Management						
Print This Page About						
ID	Fund	Description	Online Name	Active	Tax Deductible	Start Date End Date
7	new fund			✓	✓	
8	DW Mission Fund	DW Mission Fund	DW Mission Fund	✓	✓	2/5/2009 2/5/2012
9	DW's Money Money	DW's Money Money	DW's Money Money	✓	✓	2/6/1950 2/6/2050
4	TestAddFund	This is testing the Add Fund button..	TestAddFund	✓	✓	7/19/2007 7/31/2007
1	General Tithing	For general tithing.	General Tithing	✓	✓	2/1/2007 8/31/2007
5	World Wildlife Foundation	World Wildlife Foundation	World Wildlife Foundation	✓	✓	1/1/2008 12/31/2008
6	The Fund of Giving	Giving Fund	Fund of Giving	✓	✓	7/1/2007 12/31/2007
2	Building Fund	For the building of our new children's center. Build Us!	Build Us!	✓	✓	2/1/2008 8/31/2008
Page: 1 of 1 Page Size: 15 Refresh 8 Fund(s)						

- 3) Enter the following information into the Fund Management page. To edit details of an existing fund connected to a Shelby v5 Purpose, select the **Edit this Fund**  icon next to the fund

Fund Management Details

General Information	
Active	<input checked="" type="checkbox"/>
Name	General Campaign
Description	Money received with no specific funds identified
Online Name	General Campaign
Tax Deductible	<input checked="" type="checkbox"/>
Allow Pledges	<input checked="" type="checkbox"/>
Start Date	1/1/2008
End Date	12/31/2015
General Ledger Export	
Company #	1
Fund #	10
Bank Account #	100087015
Revenue Department #	25
Revenue Account #	25
Project Code	26
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	



- **Active status** – Select if the fund is active.
- **Name** – Enter the Name of the Fund.
- **Description** – Enter a description for the fund.
- **Online Name** – Enter the name to display online.
- **Tax Deductible** – Select if the fund is tax deductible.
- **Allow Pledges** – Select if you are going to allow pledges.
- **Start/End Dates** – Enter the start and end dates for this fund.
- **Company** – Enter the Arena company for this fund.
- **Fund #** - Enter the fund number.
- **Bank Account #** - Enter the bank account to use for this fund.
- **Revenue Department #** - Enter the revenue department number for this fund.
- **Revenue Account #** - Enter the revenue account number for this fund.
- **Project Code** - Enter the project code for this fund, if applicable.



As you attempt to edit funds connected to Shelby v5 purposes, you will see that many fields are grayed out due to the way these fields are set up in the connected purpose.

- 4) Click the Update button to save your fund settings.



You can change the order in which the funds will display by clicking the  double arrows. To remove a fund, click the Delete  icon. You can only delete funds with no contributions.



When creating Mission Funds, please consult your tax advisor for IRS reporting guidelines for charitable contributions.

Contribution List

The Contributions List page displays batch and individual contributions, scanned checks, check notes, fund summaries and individual contributors.

CONTRIBUTIONS

The Contribution List, as shown below, displays all Contributions, based on filter parameters. Filter options are dates, fund, type, transaction number, and name. On the results page you can make Bulk Updates, send e-mail print labels and export selected transactions.

Contribution List

Contributions
Fund Summary
Project Summary
Contributors

Contribution Total \$12,880.81
Fund Total \$12,839.21

☐ Show Memo
☐ Show Images

<input type="checkbox"/>	<u>Transaction Detail</u>	<u>Batch</u>	<u>Contribution Date</u>	<u>Name</u>	<u>Type</u>	<u>Amount</u>	<u>Fund(s)</u>
<input type="checkbox"/>	10052703045528249	"Online Batch" Visa	5/27/2010	Doe, Jon	Visa	\$33.00	DW Mission Fund: \$33.00
<input type="checkbox"/>	100527030454182224	"Online Batch" Visa	5/27/2010	Doe, Jon	Visa	\$5.00	DW Mission Fund: \$5.00
<input type="checkbox"/>	100527030454221111	"Online Batch" Visa	5/27/2010	Doe, Jon	Visa	\$3.00	DW Mission Fund: \$3.00
<input type="checkbox"/>	957912	"Online Batch" Ameri	5/27/2010	Traller, Alan	American Express	\$1.00	DW's Money Money: \$1.00
<input type="checkbox"/>	957921	"Online Batch" Ameri	5/27/2010	Traller, Alan	American Express	\$1.00	DW's Money Money: \$1.00

Page: 1 2 3 4 5 6 7 8 9 10 ... of 35
Page Size: 5
Refresh
172 Contribution(s)

Bulk-update for selected Contributions:

Reassign Person...

- **Show Memo** – Check this box to view all entered memo notes for each contribution.
- **Show Images** – Check this box to view scanned checks. You can also click a scanned check for an enlarged view.
- **Bulk-update selected Contributions** – Use this field to update the contribution date for selected transactions.
- **Reassign Person** – Use this option to reassign selected transactions to another person.



You can also sort by any singled column by clicking the column **name**.

You can export selected transactions to Excel® by clicking the Excel® icon.

Fund Summary

The Fund Summary page lists all active funds, based on the filter parameters. You can filter by date, fund, type, transaction number, and person.

Fund Summary

From Through Fund Type Transaction First Name Last Name

Apply Filter

Contributions Fund Summary Contributors

Regular Tithe	\$250.00
General Missions Fund	\$820.00
2009 Building Fund	\$100.00
Total	\$1,170.00

Contributors

The Contributors page lists all Contributors, based on the filter parameters. The results display the person's name, dates of first and last contribution, number of contributions, the average contribution amount and the total contribution.

Contributors

From Through Fund Project Type Transaction First Name Last Name

Apply Filter

Contributions Fund Summary Contributors

Person	First Contribution	Last Contribution	Contributions	Average Contribution	Fund Total
Addams, "Harley"	2/6/2009	4/16/2009	6	\$1,304.33	\$7,826.00
Barker, Kenny	2/6/2009	2/6/2009	2	\$394.00	\$788.00
Administrator, Tim	2/6/2009	2/6/2009	2	\$348.50	\$697.00
Test, Ryan	2/6/2009	2/6/2009	2	\$259.00	\$518.00
Ellis, David	2/6/2009	2/6/2009	2	\$168.50	\$337.00

Page: 1 2 3 4 5 6 7 of 7 Page Size: Refresh 32 Person(s)



You can search the results within a single column. You can also export the selected transactions to Excel® by clicking the Excel® icon.

Steps to Reassign a Contribution:

- 1) From the Contributions page, select the Contribution(s) you wish to reassign.

Reassign Person

Contributions Fund Summary Contributors

Contribution Total \$1,332.48
Fund Total \$932.48

☐ Show Memo ☐ Show Images

<input type="checkbox"/>	Transaction Detail	Batch	Contribution Date	Name	Type	Amount	Fund(s)
<input type="checkbox"/>	1232	[Unnamed Batch]	11/12/2008	Riggs, Ranger	E-Check	\$50.00	new fund: \$50.00
<input type="checkbox"/>	0234	[Unnamed Batch]	11/12/2008	Doe, Fred	E-Check	\$0.00	

Page: 1 2 3 4 5 6 7 8 9 10 ... of 11 Page Size: 2 Refresh 21 Contribution(s)

Reassign Person...

- 2) Select **Reassign Person**.
- 3) Search for the correct person.

Person Search

Search:

By Name

First Name Last Name

Advanced Search

- 4) Select the person.
- 5) Click **Select**. The Contribution reassignment is complete when you click Select.

Person Select

<input type="checkbox"/>	Select	Name	Status	Campus	Gender	Age	Home Phone
<input checked="" type="checkbox"/>		Sample, John	Member	Main Campus	M	42	(901) 757-2372

Steps to Refund a Contribution:



You can only refund non-exported transactions.

- 1) From the Contributions page, you can select the **Contribution** to refund.

Select Contribution

Transaction Detail	Batch	Contribution Date	Name	Type	Amount	Memo	Image	Fund(s)
<input type="checkbox"/> 5645	[Unnamed Batch]	11/25/2009	Maddox, Jeff	E-Check	\$25.00			The Fund of Giving: \$25.00

- 2) Select **Refund**.

Select Refund

Person
Name [Ranger Riggs](#)
Spouse
Address 3256 Poplar Ave, , Memphis, TN, 38111-3502, United States

Funds
new fund \$50.00

Details
Date 11/12/2008
Cross Check
Type E-Check
Transaction # 1232
Amount \$50.00
Memo



If the original transaction was processed through either PayFloPro or PDS, the below pop-up will display. Otherwise, skip to step #8.

- 3) Click **OK**.

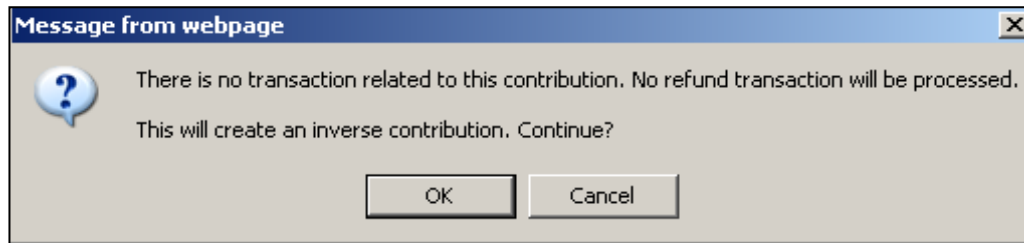
Refund Message

Message from webpage

? This will refund the amount and create an inverse contribution. Continue?

- 4) Arena will **redirect** you to the PayFloPro/PDS site where you can process the refund.
- 5) If the original transaction is not attached to a PayFloPro or PDS transaction, the below pop-up is displayed. Click **OK**.

Refund Confirmation



- 6) Arena will create a negative entry to reflect the refund.

Refund Negative Entry

Details	
Date	12/7/2009
Cross Check	
Type	Cash
Transaction #	[None]
Amount	\$10.00
Memo	
Refund processed to this contribution	

- 7) Refunds are listed on the Contributions page as a refund.


Contribution List Refund

<input type="checkbox"/>	[None]	Refunded	12/7/2009	Sample, Jane	(\$10.00) Building Fund: (\$10.00)
--------------------------	------------------------	--------------------------	-----------	------------------------------	------------------------------------



You can process refunds for one-time and repeating (whole, not partial) payments. You can process refunds for finalized and non-finalized payments.


Batch List

The Batch List, as shown below, displays previously entered Batches, that can be sorted by Date, Batch Name, whether or not the batch was finalized, and by Exportable status. You can export search results to an Excel® spreadsheet by clicking the Excel®  icon.



The Amount field of the Batch Report formats numbers over 1,000 to use commas where appropriate. The new Batch Report .rdl will only be available upon install for fresh installs. *Changes can be made to this report through Reporting Services.*

Batch List



Batch List

List of Batches

[Home](#) > [Contributions](#) > [Batch List](#)
Print This Page
About

From
Through

Batch Name

Finalized

Exportable

Apply Filter

<input type="checkbox"/> Select	ID	Batch	Date	Finalized	Exported	Control Amount	Contributions	Contribution Total	Difference	Fund(s)	Type
<input type="checkbox"/>	235	Online Giving Visa M	12/8/2009 12:00 AM			\$120.00	2	\$120.00	\$0.00	DW Mission Fund: \$100.00 Event Fund: \$20.00	Visa/Mastercard
			12/9/2009 12:00 AM								
<input type="checkbox"/>	234	Refunded	12/8/2009 12:46 PM			(\$25.00)	1	(\$25.00)	\$0.00	Building Fund: (\$25.00)	Unknown
			12/8/2009 12:00 AM								

Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ... of 64
Page Size:
Refresh
128 Batch(s)

Export to GL File

Contribution Total: **\$12,294.65**

Funds

DW Mission Fund	\$434.17
Event Fund	\$20.00

Steps to Export from the Batch List to Shelby v5:

- 1) Go to the Contributions→**Batch List** page.
- 2) Use the Filter to access the **Finalized** batch.
- 3) Use the Filter to select to export the batch to Shelby GL or Shelby Financials (Contributions).
- 4) Click **Export to GL File**.

Batch List

Batch List
Contribution Batch List

Home > Contributions > Batch List

From: [] Through: [] Batch Name: **gen** Finalized: **Yes** Exportable: **To Shelby V5** Apply Filter

Select	ID	Batch	Date	Finalized	Exported	Control Amount	Contributions	Contribution Total	Difference	Fund(s)	Type
<input checked="" type="checkbox"/>	36	General Tithe	3/11/2010 12:00 AM - 3/11/2010 12:00 AM	✓	✓	\$100.00	1	\$100.00	\$0.00	Offering-Tithes: \$100.00	Unknown
<input type="checkbox"/>	55	General Tithe	3/11/2010 12:00 AM - 3/11/2010 12:00 AM	✓		\$500.00	2	\$500.00	\$0.00	Offering-Tithes: \$500.00	Unknown
<input type="checkbox"/>	50	General Fund	5/21/2009 12:00 AM - 5/21/2009 12:00 AM	✓		\$100.00	1	\$100.00	\$0.00	General Campaign: \$100.00	Unknown
<input type="checkbox"/>	34	General Fund	4/20/2009 12:00 AM - 4/20/2009 12:00 AM	✓		\$1,500.00	1	\$1,500.00	\$0.00	General Campaign: \$750.00 2009 Building Fund: \$750.00	Unknown
<input type="checkbox"/>	15	General Batch	1/27/2009 12:00 AM - 1/27/2009 12:00 AM	✓		\$500.00	2	\$500.00	\$0.00	General Campaign: \$250.00 Community Outreach Programs: \$250.00	Unknown
<input type="checkbox"/>	10	General Fund	12/11/2008 12:00 AM - 12/11/2008 12:00 AM	✓		\$5,000.00	2	\$5,000.00	\$0.00	General Campaign: \$1,250.00 General Missions Fund: \$3,750.00	Unknown

Page: 1 of 1 Page Size: 1531 Refresh 6 Batch(s)

Export to GL File

- 5) Select the **Journal Type**, as shown below.
- 6) Enter the appropriate **Accounting Period**, as shown below.
- 7) Click **Export**.

GL File Export

GL File Export

Description: Contributions

Journal Type: Contributions

Accounting Period: 1

Date: 3/11/2010

Preview

Company	Fund	Account	Dept	Amount
001	001	4567		100.00
001	001	401110	789	-100.00

Export Cancel

Repeating Payments

The Contributions → Repeating Payments page allows you to view and edit all repeating payments for your members, as shown below. This list displays the Identifier code for the transaction, the member's Name, the Frequency of the payment, the date of the First Payment, the total Number of Payments, the payment Method, the Status of the repeating payment, and the Amount of the total periodic payment (not the total of all payments over all periods) for that transaction.

Repeating Payments

Repeating Payments
List of all repeating payments

Home > Contributions > Repeating Payments Print This Page About

First Name Set up between and
 Last Name Amount From To
 Identifier Frequency ☐ Show Active and Inactive

Identifier	Name	Frequency	First Payment	Number Payments	Method	Status	Amount
09021216305410	Weinberg, Kaly	Every Week	2/13/2009	Until Cancelled	Visa	Active	\$1.01
090212163810462	Weinberg, Kaly	Every Week	2/13/2009	1	Visa	Active	\$1.02
090212165438423	Weinberg, Kaly	Every Week	2/13/2009	1	Visa	Active	\$1.03
090211103406327	Smothers, Tina	Every Week	2/12/2009	Until Cancelled	Visa	Active	\$1.00
090211105200313	Doe, Jon	Every Week	2/12/2009	Until Cancelled	Visa	Active	\$3.00
090211105305526	Doe, Jon	Every Week	2/12/2009	Until Cancelled	Visa	Active	\$3.00

You can filter based on the Repeating Payment Identifier, a date range in which the payment schedule was set up, an amount range, the Frequency, the contributor, and/or the Repeating Payment Profile's Active status. You can also click person's [Name](#) to bring up their Person Details page, or you can click on a transaction Identifier number to bring up the details of that transaction, as shown below.

Transaction Details

Details

Identifier 071010154246388
 Profile Name My Giving Profile
 Person [John Smith](#)
 Gateway Account CC
 Status Active
 Frequency Every Week
 Begin Date 10/11/2007
 Total Contribution \$20.00
 Payment Method Visa
 Account Number XXXXXXXXXXXX1111
 Next Payment Date 10/11/2007
 Last Status Update 10/10/2007 4:05 PM
[Update Now](#)

Funds

General Tithes 2007 \$20.00

Transactions

Transaction Date	Payment Type	Payment Method	Transaction Detail	Amount	Notes
Total Transaction Amount: \$0.00					

History


Date	History	User
10/10/07 03:42:46 PM	Added 20.00 allocation to "General Tithes 2007" fund	chrir
10/10/07 03:42:46 PM	Created Repeating Payment	chrir








When you enter or process a payment, Arena can send an email to the Contributors.

Steps to Add a Repeating Payment:

Permissions may vary by user.

- 1) On the Repeating Payment page, select the **Add Repeating Payment**  icon.

New Repeating Payment

Identifier	Name	Frequency	First Payment	Number Payments	Method	Status	Amount	
971307	Giving_Online	Every Week	6/10/2010	3	Mastercard	Active	\$1.00	
971308	Giving_Online	Every Week	6/10/2010	3	Mastercard	Active	\$1.00	
971309	Giving_Online	Every Week	6/10/2010	3	Mastercard	Active	\$1.00	
970554	Giving_Online	Every Week	6/9/2010	2	Mastercard	Active	\$1.00	
970555	Giving_Online	Every Week	6/9/2010	2	Mastercard	Active	\$1.00	

Page: 1 2 3 4 5 6 7 8 of 8 Page Size: 5 Refresh 40 Repeating Payment(s)

Query: ACH Test for missing profile: Add New Repeating Payment

- 2) Search and select for an **existing record**.
- 3) **Confirm** Information.

New Repeating Payment

Contact Information
Please confirm your contact information below.

First Name

Last Name

E-mail Address

Home Phone

Address

City/State/Zip ,

Country

- 4) Click **Next**.
- 5) Enter a **Profile Name**.
- 6) Select **Frequency**. *Frequencies will vary being that these are determined by the Payment Gateway provider.*
- 7) Enter or select **Begin Date**.
- 8) Enter **amount(s)** for each fund.

Frequency and Amount

Giving Frequency and Amount
Enter the frequency and amount that you'd like to give.

Profile Name

Frequency

Begin Date

Fund	Amount
Passage Fund	\$ <input type="text" value="1.00"/>
DW Mission Fund	\$ <input type="text"/>
DW's ONLINE NAME	\$ <input type="text"/>
Build Us!	\$ <input type="text"/>
Payment Total	\$ <input type="text" value="1.00"/>

10) Click Next.

11) Select **payment method**.

Payment Method

Payment Information

Enter how you would like to make your automated contribution.

Payment Method ☒ Credit Card ☐ Bank Account

Credit Card Information

You will be redirected to a secure Payment Data Systems site. For more information about the redirect, click [here](#).

Previous

Next

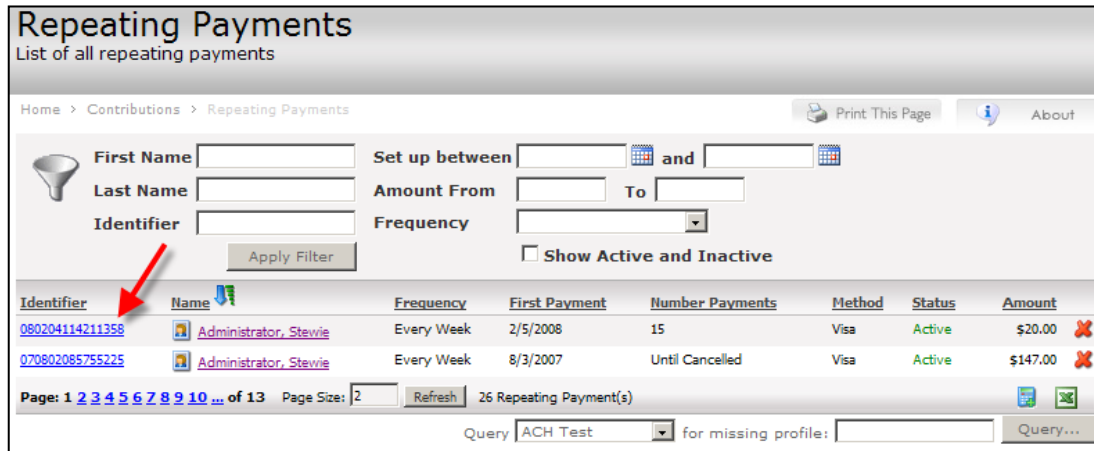
Cancel

12) Click **Next** and complete the required payment information.

Steps to Edit a Repeating Payment:

- 1) Click on the [Identifier](#) number to pull up the details of the repeating payment.

Repeating Payment Identifier



Repeating Payments
List of all repeating payments

Home > Contributions > Repeating Payments

Print This Page About

First Name Set up between and
 Last Name Amount From To
 Identifier Frequency ☐ Show Active and Inactive

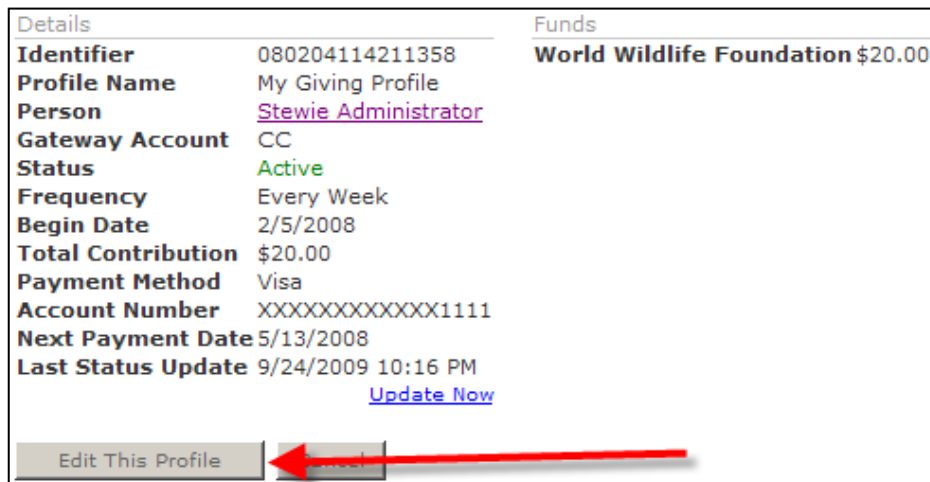
Identifier	Name	Frequency	First Payment	Number Payments	Method	Status	Amount
080204114211358	Administrator, Stewie	Every Week	2/5/2008	15	Visa	Active	\$20.00 ✖
070802085755225	Administrator, Stewie	Every Week	8/3/2007	Until Cancelled	Visa	Active	\$147.00 ✖

Page: 1 2 3 4 5 6 7 8 9 10 ... of 13 Page Size: 2 Refresh 26 Repeating Payment(s)

Query ACH Test for missing profile: Query...

- 2) Click **Edit this Profile.**

Edit This Profile



Details		Funds
Identifier	080204114211358	World Wildlife Foundation \$20.00
Profile Name	My Giving Profile	
Person	Stewie Administrator	
Gateway Account	CC	
Status	Active	
Frequency	Every Week	
Begin Date	2/5/2008	
Total Contribution	\$20.00	
Payment Method	Visa	
Account Number	XXXXXXXXXXXX1111	
Next Payment Date	5/13/2008	
Last Status Update	9/24/2009 10:16 PM	
	Update Now	
<input type="button" value="Edit This Profile"/>		

3) Make changes.

Repeating Payment Details

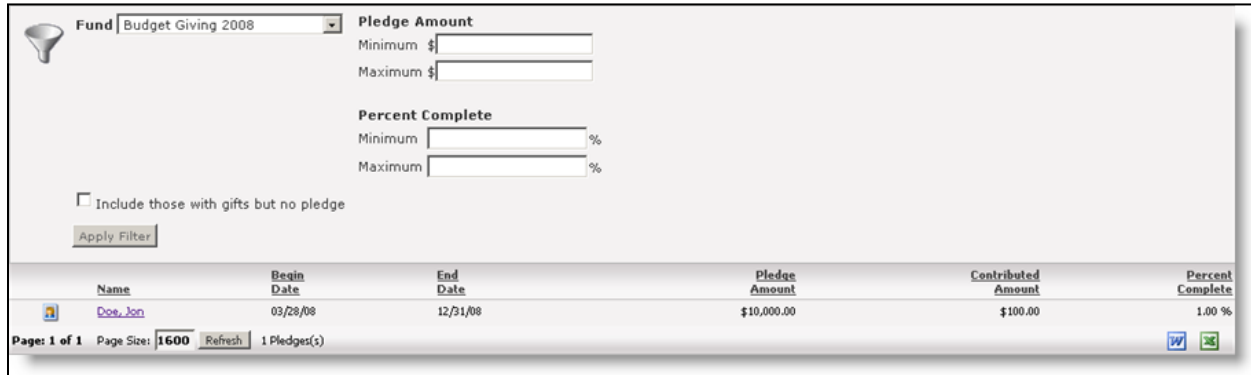
Identifier	080204114211358
Person	Stewie Administrator Change... Remove
Profile Name	<input type="text" value="My Giving Profile"/>
Frequency	<input type="text" value="Every Week"/>
Begin Date	<input type="text" value="12/30/2009"/>
Fund	Amount
DW Mission Fund	<input type="text" value="\$"/>
DW's Money Money	<input type="text" value="\$"/>
Event Fund	<input type="text" value="\$"/>
Mission Trips General Fund	<input type="text" value="\$"/>
TestAddFund	<input type="text" value="\$"/>
General Tithing	<input type="text" value="\$"/>
World Wildlife Foundation	<input type="text" value="\$ 20.00"/>
Fund of Giving	<input type="text" value="\$"/>
Build Us!	<input type="text" value="\$"/>
Payment Total	<input type="text" value="\$ 20.00"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

4) Click **Save**.

Pledges

Pledges allow you to view previously entered pledges based on the filter parameters. The filters allow you to search by **Fund**, **Pledge Amount** (Minimum and Maximum), and **Percent Complete** (Minimum and Maximum).

Pledges




Fund Budget Giving 2008



Pledge Amount
Minimum \$
Maximum \$

Percent Complete
Minimum %
Maximum %

☐ Include those with gifts but no pledge

Apply Filter

Name	Begin Date	End Date	Pledge Amount	Contributed Amount	Percent Complete
 Doe, Jon	03/28/08	12/31/08	\$10,000.00	\$100.00	1.00 %

Page: 1 of 1 Page Size: 1600 Refresh 1 Pledge(s)  

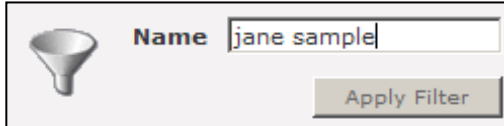
Pledge Quick Entry

Pledge Quick Entry allows you to enter one pledge amount, per fund, per contributor. Contributions processed during the pledge period, will post against that pledge. There is also the option to creating Repeating Payments, if permissions allow the user to do so.

Steps to enter New Pledge:

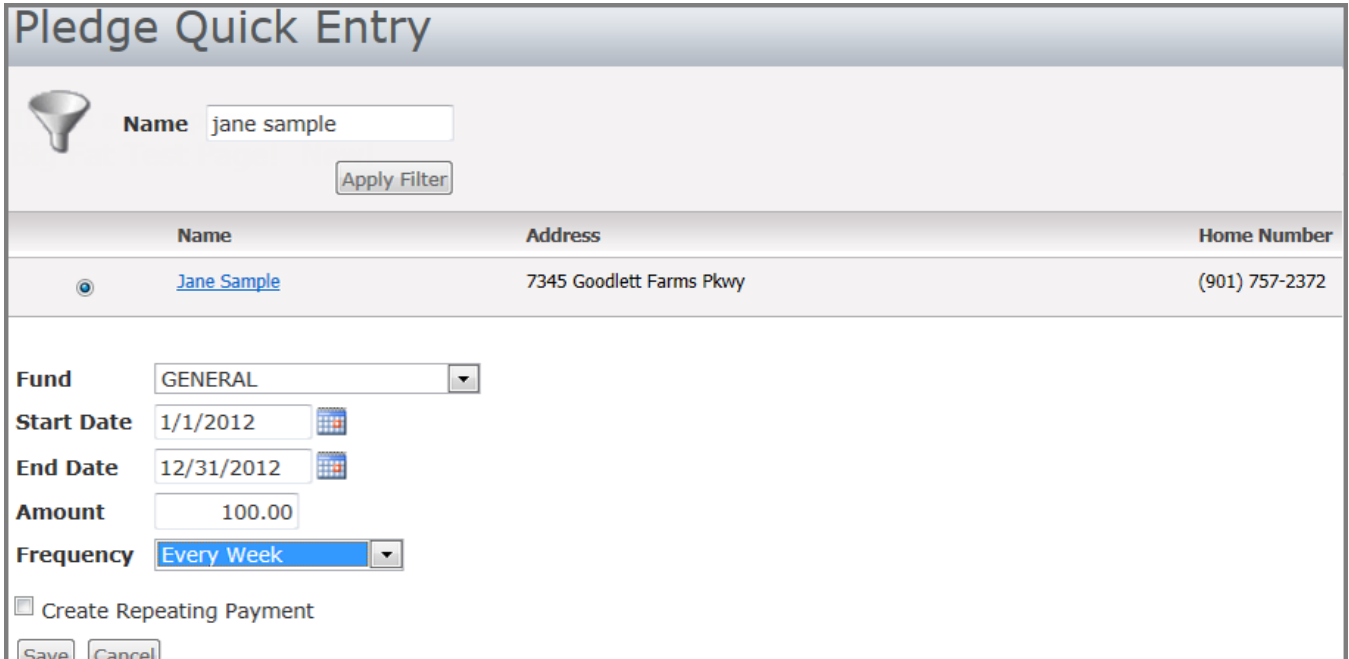
- 1) Select **Pledge Quick Entry** under Contributions.
- 2) Enter name and click **Apply Filter**.

Name Search



- 3) Select **Fund**.
- 4) Enter or select the **Start Date**.
- 5) Enter or select the **End Date**.
- 6) Enter the **Amount**.
- 7) Select the **Frequency**.

New Pledge




Name	Address	Home Number
<input checked="" type="radio"/> Jane Sample	7345 Goodlett Farms Pkwy	(901) 757-2372

Fund GENERAL
Start Date 1/1/2012
End Date 12/31/2012
Amount 100.00
Frequency Every Week
☐ Create Repeating Payment
 Save Cancel

- 8) Click **Save**.


Steps to Edit a Pledge



- 1) Click the Contributions tab on the Person Detail page.
- 2) Select the edit  icon of the pledge you would like to edit

Individual Pledge

Person Detail

Individual Information Security Person Viewed **Contributions** Prayer Requests Mission Details Counseling

 Pledges


Fund	Responsible Person	Begin Date	End Date	Amount	Contributions	Balance	
General Campaign	Chris	1/1/2009	12/31/2009	\$5,000.00	\$0.00	\$5,000.00	 






Page: 1 of 1 Page Size: 139 Refresh 1 Pledge(s)


Add Pledge: Offering-Tithes Add

- 3) Edit the amount and dates, as desired.

Editing a Pledge

 Pledges

Fund	Responsible Person	Begin Date	End Date	Amount	Contributions	Balance	
General Campaign	Chris	1/1/2009 	12/31/2009 	5000.00	\$0.00	\$5,000.00	  

- 4) Click the save  icon.

Contribution Analysis

This report allows you to view the contributions for selected funds.

Steps to View Contributions Analysis Report:

- 1) Click Contributions→Contributions Analysis.
- 2) Enter the **date range** and **select funds**.

Contributions Analysis Parameters

This is a new page.

Date Range

From

Through

Funds

☐ Passage Fund

☐ The Export Fund

☐ General Tithing

- 3) Click **Apply Filter**. *The report will display.*

Contributions Analysis Report

Total Dollars Given \$4,027.00						
Average Given \$223.72						
Median Given \$49.00						
Contributors 18						
Contributions 113						
Range	Contributors	Percentage Contributors	Average Given	Median Given	Total Given	Percentage
0-500	12	66.67	62.58	49.00	751.00	18.65
501-1000	1	5.56	300.00	300.00	300.00	7.45
1001-5000	2	11.11	1,524.50	1,524.50	3,049.00	75.71
5001+	0	0.00	0.00	0.00	0.00	0.00
Top 10%	1	5.56	2,049.00	2,049.00	2,049.00	50.88
Top 20%	2	11.11	1,524.50	1,524.50	3,049.00	75.71
Top 30%	3	16.67	1,116.33	1,000.00	3,349.00	83.16
Top 40%	4	22.22	887.25	650.00	3,549.00	88.13
Top 50%	5	27.78	748.80	300.00	3,744.00	92.97
Top 60%	6	33.33	640.67	250.00	3,844.00	95.46
Top 70%	7	38.89	556.29	200.00	3,894.00	96.70
Top 80%	8	44.44	493.00	197.50	3,944.00	97.94
Top 90%	9	50.00	443.78	195.00	3,994.00	99.18
Top 100%	18	100.00	223.72	49.00	4,027.00	100.00
17% of the contributors gave 83% (\$3,349 of the total amount)						

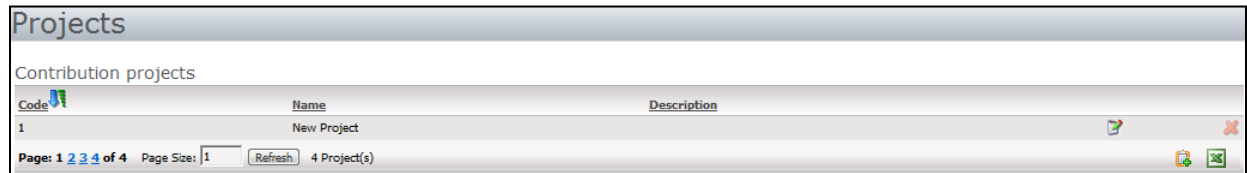
Projects

Projects are available for both Funds and Mission trips.

Steps to Add Manually a Project:

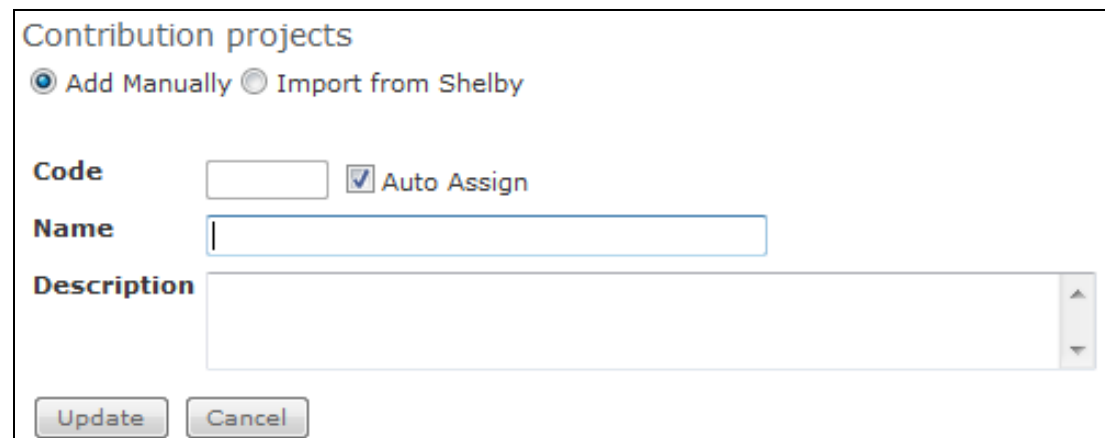
- 1) On the Project List page, click the Add New Contribution Project  icon.

Contribution Projects



- 2) Enter the **Code** or leave **Auto Assign** selected. *If you select Auto Assign, the next available numerical value is assigned to this fund.*
- 3) Enter the **Name** for this project.
- 4) Enter a **Description** for this project

New Project

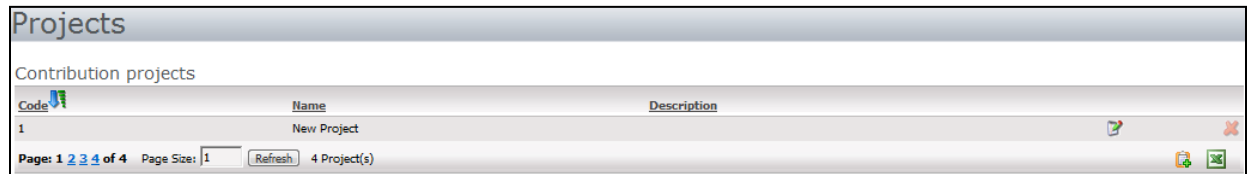


- 5) Click **Update**.

Steps to Import to Shelby v.5 Active Project Code to Arena:

- 1) On the Project List page, click the Add New Contribution Project  icon.

Contribution Projects

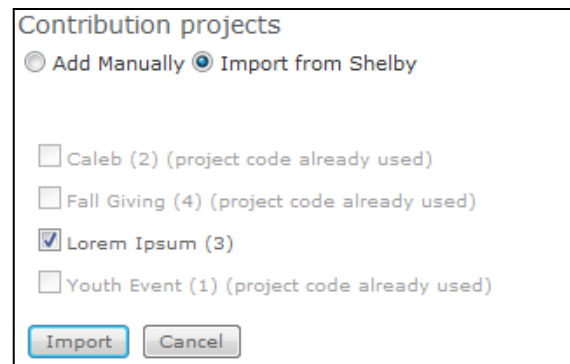


Code	Name	Description
1	New Project	

Page: 1 2 3 4 of 4 Page Size: 1 Refresh 4 Project(s)

- 2) Select the **Import from Shelby** radio button. *You can import Shelby v5 Project Codes not already in use in Arena.*
- 3) Select Enter the **Name** for this project.

Import a Project



Contribution projects

☐ Add Manually ☒ Import from Shelby

☐ Caleb (2) (project code already used)

☐ Fall Giving (4) (project code already used)

☒ Lorem Ipsum (3)

☐ Youth Event (1) (project code already used)

Import Cancel

- 4) Click the **Edit** icon of the project you just imported.

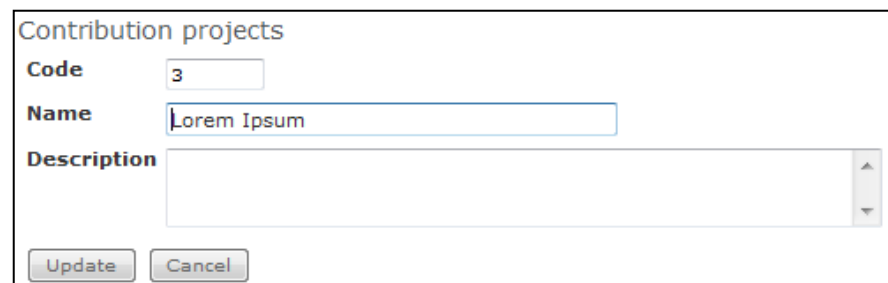
Project List Edit



3	Lorem Ipsum		
---	-------------	---	---

- 5) Enter the appropriate **description** for this project.

Edit Imported Project



Contribution projects

Code

Name

Description

Update Cancel

- 6) Click **Update**.

If using Project Codes, you will first want to make the appropriate Contribution application setting change, as shown below.

Application Settings

Arena Contributions

Search... Date: 08/01/2012

Spouse: Campus

Address:

Batch Control Amount: \$500.00
Contributions: \$250.00
Difference: \$250.00

Funds

Fund	Pledge Amount	Pledge Balance	Amount	NC	Project
DW Mission Fund			\$0.00		...
Building Fund			\$0.00		...
World Wildlife Foundation			\$0.00		...
The Fund of Giving			\$0.00		...
			\$0.00		...

Not Assigned to a Fund: \$0.00

<< Previous Next >> Done Cancel

Reset Scanner

Jane Sample Wednesday, August 01, 2012 1:58:43 PM

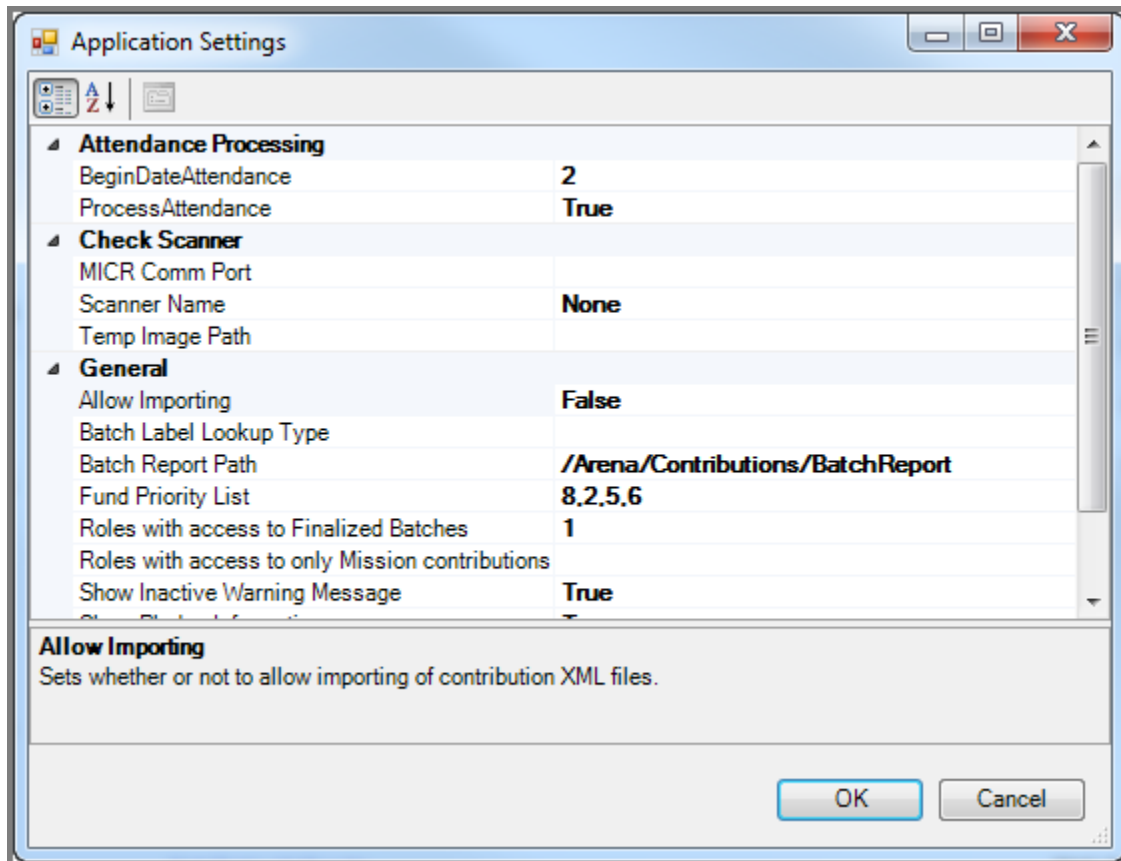


Contributions Application

The Contributions application is a Click Once application used to process scanned checks.

Steps to Create a Batch:

- 1) Launch the application by double clicking the Arena **Contributions** executable on the desktop or from the left-navigation bar.
- 2) Contribution Applications



- 3) Enter the batch date and the control amount, and give the batch a name.

Creating a Batch

Contributions

Add Batch Open Batches

1 2 3

Add Batch

Enter the batch date and the amount of the batch. You can also optionally add a label for your batch for future identification. Once you've entered this information click 'Next' to begin entering your contributions.

Batch Date	10/09/2007
Control Amount	50.00
Batch Label	

Optional

Next >>

[Reset Scanner](#)

Christopher Randolph

jesday, October 09, 200 10:36:03 AM

ARENA

- 4) Click **Next**.

- 5) **Enter checks** either using a check scanning device or manually. *If the person has already been associated to the account number the person information will automatically populate, as shown below.*

Contribution Scanned Entry

- You can adjust the Auto Detect POS Scanner setting if it accidentally is set to True when there is no scanner attached to the kiosk.
- Arena supports the Cannon CR-55 and CR-180 scanners.
- The Contributions application remembers the last setting of payment Type by a user. This will be the default Type the next time you open Contributions.
- You can enter a Mission trip contribution, if there is an active mission trip. The option to contribute to a Mission Team Member does not display if no active Mission Trip are in Arena.

Click [Associations](#) to change the person associated with the bank account. You can select another family member from the dialog box.

- 6) If there is not a record associated with a MICR number then you need to look it up using the person search. Click the **Search** button in the top left corner to use the quick search tool to locate and select the appropriate record. *You can search by first name, last name, a combination of both, or by person ID.*

Manual Search

First Name

jane

Last Name

sampl

Search

Person ID

Search ID

Envelope Number

Search

Search Results

	First Name	Last Name
▶	Jane	Sample

Person Details

Jane Sample

ID

395

Foreign Key

0

Member Status

Member

Record Status

Active

Campus

Campus 1

Birth Date

10/3/1966

Age

45

Gender

Female

Marital Status

Married

Contribute

With Spouse

Envelope Number

66

Home Phone

(901) 757-2372

Business Phone

Cell Phone

(901) 123-1234

Other Phone

E-mail

linda.johnson@arenachms.com

Address

7345 Goodlett Farms Pkwy
Cordova, TN 38016-4990

Spouse

[John Sample](#)

Child

[Pete Sample](#)

[Suzy Sample](#)

Added By

lindaj on 4/25/2010

Modified By

lindaj on 7/20/2012

Last Verified

7/20/2012

Add New

Edit

Select

Cancel

- 7) If the person is not in Arena, you will have the option to add him or her.

Adding a Member

Member Status
Record Status
Campus
Birth Date
Age
Gender
Marital Status
Contribute
Envelope Number
Home Phone
Business Phone
Cell Phone
Other Phone
E-mail
Address

Added By
Modified By
Last Verified

Add New Edit Cancel

Person Search

First Name Last Name Search Person ID Search ID Envelope Number Search

Search Results

First Name Last Name

Person Details

Personal Information

First Name **Matthew** Birthdate **10/03/1966**
Last Name **Sample** Marital Status **Single**
Nick Name **Matt** Member Status **Member**
Gender Campus **Campus 1**

Contact Information

Home Phone **(901) 757-2372** Work Phone
Cell Phone Other Phone
E-mail **msample@shelbyinc.com**

Home Address

Street **7345 Goodlett Farms Pkwy**
City/St/Zip **Cordova**, **TN** **38016**
Country **United States**

Contribution Details

☐ Contribute Individually ☐ Assign Envelope Number

OK Cancel

- 8) Highlight the person and click **Select** in the bottom right corner to associate the transit and account number to the person.

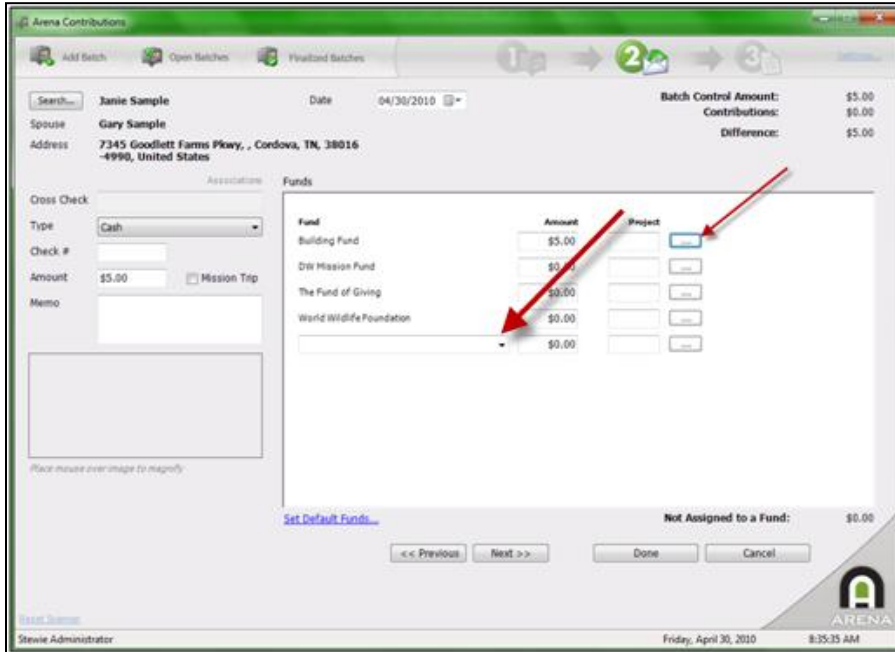
- 9) **Enter** the amount of the check.
- 10) **Click** tab to enter the amount to the first fund in your list on the right hand side is the list. If the amount should go into another fund then you can manually make this adjustment.
- 11) **Click** the Next button in the bottom right to enter the contribution.
- 12) Once you enter all contributions for this batch click **Done** to proceed to the batch summary page. *If the sum total of all entries exceeds that of the control amount that was initially set up then there will be a negative difference amount alerting you to this.*
- 13) You can now enter the contribution. *Once you enter the Amount, by default Arena will post to the first fund listed. To move the contribution to a different fund, press Delete then Tab on your keyboard until the fund posts to the desired fund, or you can delete the amount and enter it into the desired fund. If needed, you can also enter a negative amount in the Amount field.*

As you process contributions, you can add the same fund multiple times in order to accommodate different project codes for the same fund.

Steps to Select Project Codes:

- 1) Click the ellipsis  icon

Using Project Codes

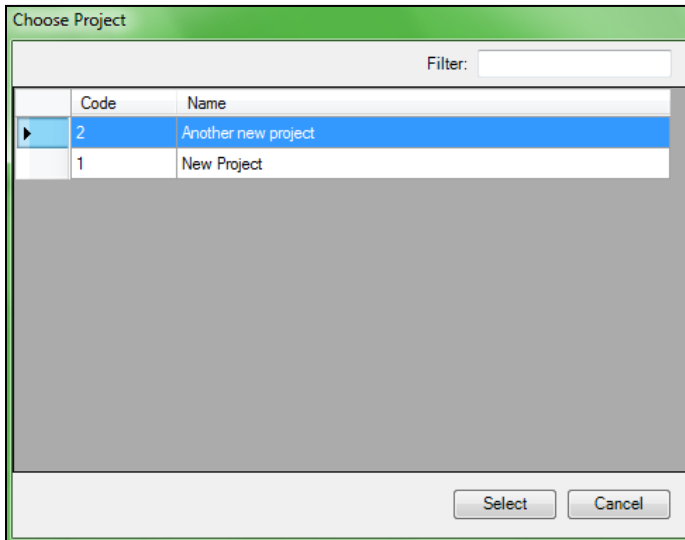


The screenshot shows the 'Arena Contributions' window. In the 'Funds' section, there is a table with columns 'Fund', 'Amount', and 'Project'. The 'Project' column has a dropdown menu for each fund. A red arrow points to the ellipsis icon next to the 'Project' column header. Another red arrow points to the 'Project' dropdown menu for the 'Building Fund'.

Fund	Amount	Project
Building Fund	\$5.00	[Dropdown]
Orin Mission Fund	\$0.00	[Dropdown]
The Fund of Giving	\$0.00	[Dropdown]
World Wildlife Foundation	\$0.00	[Dropdown]
	\$0.00	[Dropdown]

- 2) Select the desired **Project Code**.

Choose Project Code



The 'Choose Project' dialog box shows a table with the following data:

Code	Name
2	Another new project
1	New Project

The '2' in the first row is selected. At the bottom, there are 'Select' and 'Cancel' buttons.

- 3) Click **Select**.

Steps to Export a Batch:

- 1) From the Contribution Application, click the **Finalize Batch button** on the Open Batch page or the **Export button** from the Finalized Batch page. *You must finalize a batch prior to exporting.*

Open Batch page

Open Batch List

Below are all the batches that have not yet been finalized. To view and update the contributions for a batch, select it from the list below and hit Enter (or double-click on the batch).

Batch ID	Label	Date	Created By	Contributions	Contribution Total	Control Amount	Difference
171	Online Giving ACH	10/8/2011	system	1	\$30.00	\$30.00	\$0.00
170	Online Giving ACH	10/9/2011	system	1	\$70.00	\$70.00	\$0.00
169	Online Giving ACH	10/1/2011	system	1	\$30.00	\$30.00	\$0.00
168	Online Giving ACH	9/24/2011	system	1	\$30.00	\$30.00	\$0.00
157	Online Giving ACH	8/20/2011	system	1	\$30.00	\$30.00	\$0.00
246	Sunday AM Cash...	7/11/2012	lindaj	1	\$500.00	\$500.00	\$0.00
244	[Unnamed Batch]	7/11/2012	lindaj			\$0.00	\$0.00
243	[Unnamed Batch]	7/11/2012	lindaj			\$0.00	\$0.00
242	[Unnamed Batch]	7/11/2012	lindaj			\$100.00	(\$100.00)
240	[Unnamed Batch]	7/6/2012	lindaj			\$0.00	\$0.00
237	[Unnamed Batch]	7/2/2012	lindaj			\$0.00	\$0.00
230	test	6/28/2012	lindaj			\$10.00	(\$10.00)
229	[Unnamed Batch]	6/28/2012	lindaj			\$10.00	(\$10.00)
228	[Unnamed Batch]	6/27/2012	lindaj			\$50.00	(\$50.00)
227	[Unnamed Batch]	6/20/2012	lindaj			\$100.00	(\$100.00)
226	[Unnamed Batch]	6/20/2012	lindaj			\$0.00	\$0.00

Buttons: Edit Batch, Finalize Batch, Delete Batch, Import Batch, Add Batch, Batch Report

Reset Scanner
The Wife Johnson
Saturday, July 21, 2012 7:53:25 AM
ARENA

Finalize Batch page

Finalized Batch List

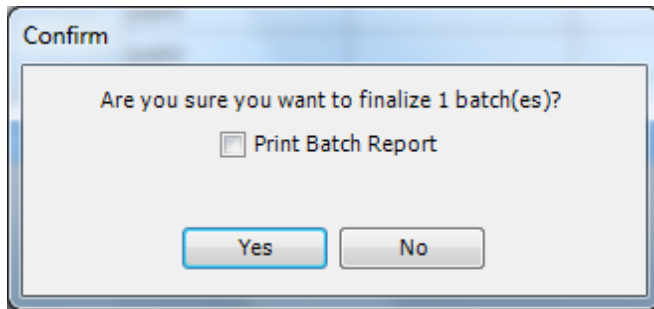
Below are all the batches that have been finalized. You can copy or export a finalized batch.

Batch ID	Label	Date	Created By	Contributions	Contribution Total	Control Amount	Difference
245	Weekend Offering	7/8/2012	lindaj	7	\$2,300.00	\$2,300.00	\$0.00
241	test	7/6/2012	lindaj	1	\$100.00	\$100.00	\$0.00
239	Brentwood test	7/1/2012	lindaj	3	\$500.00	\$500.00	\$0.00
224	[Unnamed Batch]	6/7/2012	lindaj	6	\$2,300.00	\$2,300.00	\$0.00
223	NCC Test	6/3/2012	lindaj	4	\$500.00	\$500.00	\$0.00
187	Online Giving ACH	5/26/2012	system	1	\$30.00	\$30.00	\$0.00
186	Online Giving ACH	6/2/2012	system	1	\$30.00	\$30.00	\$0.00
183	General Tithe	5/27/2012	lindaj	6	\$2,300.00	\$2,300.00	\$0.00
182	General Tithe	5/31/2012	lindaj	4	\$500.00	\$500.00	\$0.00

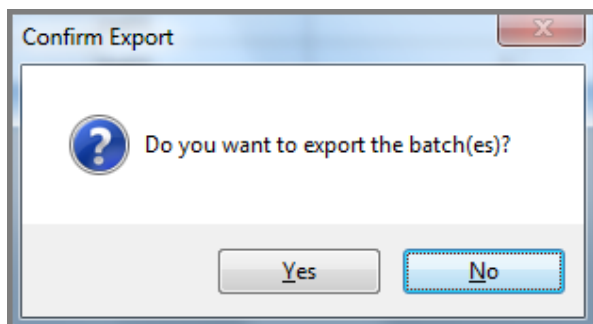
Buttons: Copy, Export

Reset Scanner
The Wife Johnson
Saturday, July 21, 2012 7:44:15 AM
ARENA

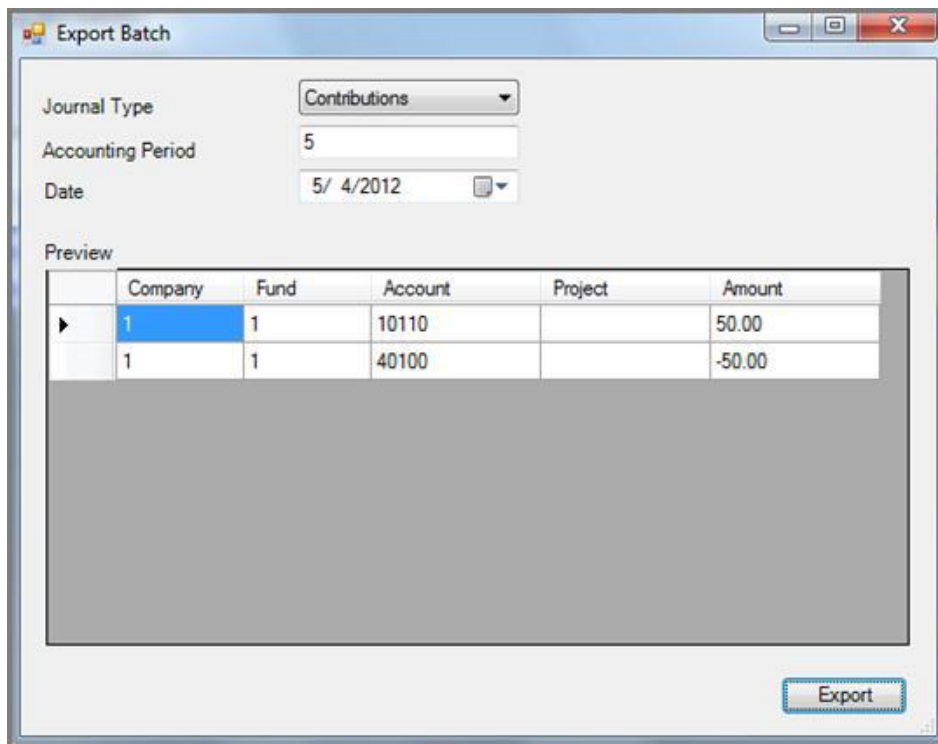
- 2) On the Confirm pop-up window, click the **Yes button**. You can also select the *Print Batch Report* box to print the batch report prior to exporting.



- 3) On the Confirm Export pop-up window, select **Yes** to confirm the batch export.

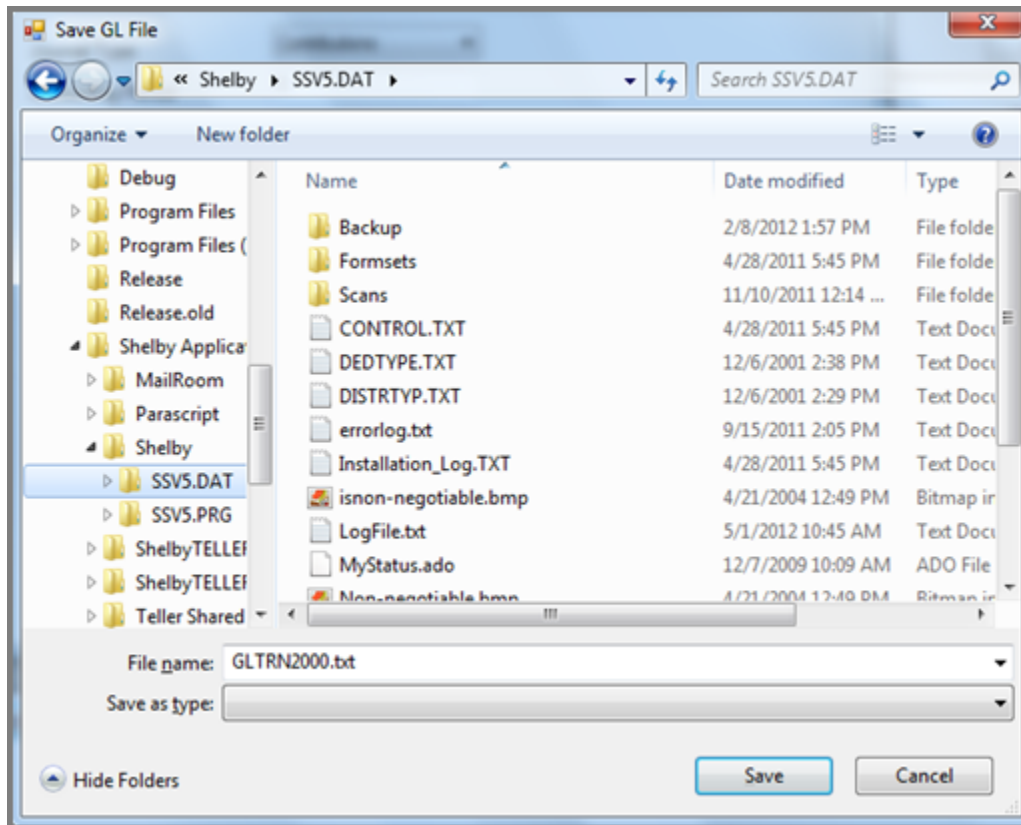


- 4) From the Export Batch pop-up window, make the **desired selections and entries**.



- 5) Click **Export**.

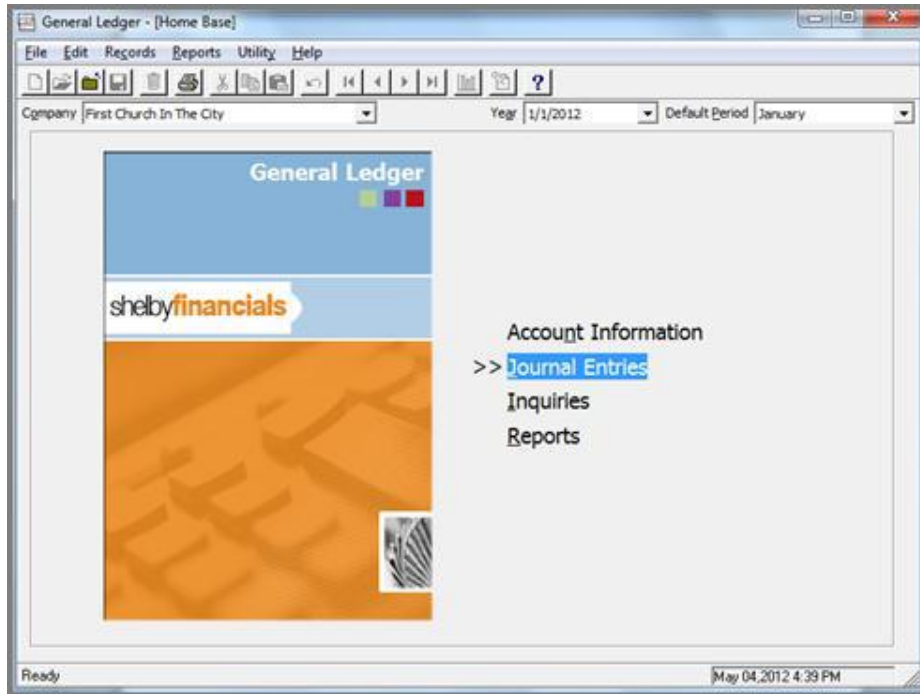
- 6) Save the GLTRN2000.txt file. **You must save the GLTRN2000.txt in the SSV5.DAT folder.**



- 7) Now you are ready to import the file into **Shelby v.5 General Ledger**.

Steps to Import the GLTN2000.txt file:

- 1) Open Shelby v.5 Journal Entries module. *When opening Shelby v.5 Journal Entries module, the import process will begin automatically if the GLTN2000.txt file is present in the SSV5.DAT folder.*



- 2) Click **es** on the Import Entries popup.



- 3) Select the desired **Fiscal Year**.



The screenshot shows a dialog box titled "Pick a Fiscal Year". Inside the dialog, the text "001 First Church In The City" is displayed at the top. Below it, "Journal Type: CN Reference #: 00000" is shown. The main instruction reads "What year do you want to put this entry into." Below this instruction is a dropdown menu with "1/1/2012" selected. At the bottom of the dialog, there are two buttons: "Update All Entries" on the left and "OK" on the right.

- 4) Click **OK**.

Contributions Entry (optional)

On this page, you will be able to create manual batches and import Shelby Teller batches.


Steps to create a manual batch:

- 1) Click **Contributions Entry**.
- 2) Enter a **batch name**, **batch date**, and **control amount**.

Contribution Entry

This is a new page.

Batch Name

Batch Date 

Control Amount



Choose file to import No file chosen


- 3) Click **Next**.
- 4) Complete **all fields** as desired.

Using an existing record

Contribution Entry

Big Fat Test Page! New!

Person  

Contribution Date 

Payment Type

Check #





Amount

Memo


Control Amount \$500.00

Contributions \$500.00

Difference \$0.00

Purposes	Project Code	Pledges	Amount
MAX			\$ 250.00
BOOK			\$
GENERAL			\$ 250.00
<input type="text" value="07EMPPLG"/>			\$
Missions			\$
Total			\$ 500.00


Show All Funds


- Use the **person picker**  icon to search and select by name, address, postal code, envelope number or phone number. *Enter at least one letter for first and last name if searching by name.* Click **Add New Person** icon, if no record is found.


Adding a New Record



Add Person

Personal Information



First Name John **Birthdate** 01/01/2012 

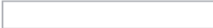
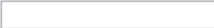
Last Name Tester **Marital Status** Single 


Nick Name Johnny **Member Status** Member 

Gender Male  **Campus** Campus 1 


Contact Information


Home Phone (901) 123-1234 **Work Phone**  ext. 


Cell Phone  **Other Phone** 

E-Mail jtester@gmail.com 


Home Address

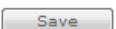
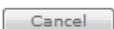
Street 7345 Goodlett Farms Parkway 


City/State/Zip Cordova TN 38016 

Country US 

Contribution Details

☒ **Contribution Individually** **Envelope Number** 7890 


 

- Enter or select a **Contribution Date**.
- Select a **Payment Type**.
- Enter an **Amount**.
- Enter a **Memo**, if desired.
- Enter the amount for each **Purpose**.
- If desired, click the **Project Code**  icon to select a Project Code


Project Codes

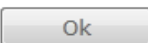
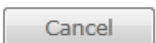
Select a project code for "MAX"

Code

555 

Available Codes

555 - Alan Parsons Project 

- Click **OK**.

- 5) Click the **Save Contribution** button to enter the next contribution. *Repeat steps 4, 5, and 6 for each contribution.*

Person (not set)

Control Amount \$500.00

Contributions \$500.00

Difference \$0.00

Save Batch

Contribution Date 3/7/2012

Payment Type

Check #

Amount \$ 0.00

Memo

Purposes

Amount

Building Fund \$

TestAddFund \$

World Wildlife Foundation \$

EMERG \$

08EMPPLG \$

07EMPPLG \$

Total \$ 0.00

Show All Funds

Detail	Date	Name	Type	Amount	
1234	3/7/2012	Jane Sample	Cash	\$100.00	
[None]	3/7/2012	Laura Clem	Cash	\$200.00	
[None]	3/7/2012	Johnny Tester	Non-Cash	\$200.00	

Add New Contribution

Cancel

< Previous

Save Contribution

- 6) Click **Save Batch** when all entries are complete. *The below screen will display. From this page, you can **edit** the batch, delete the batch, and reassign contributions.*

Detailed info about a Batch

Details

Name General Tithe

Batch Date 3/4/2012 12:00 AM

Control Amount \$500.00

Finalized No

Type Unknown

Funds

Building Fund \$100.00

World Wildlife Foundation \$100.00

EMERG \$300.00

Fund Total \$500.00

Edit Details

Delete This Batch

Contributions

Fund Summary

Contribution Total \$500.00

Fund Total \$500.00

☐ Show Memo

☐ Show Images

<input type="checkbox"/>	Transaction Detail	Contribution Date	Name	Type	Amount	Fund(s)
<input type="checkbox"/>	[None]	3/7/2012	Sample, Jane	Cash	\$500.00	EMERG: \$300.00 Building Fund: \$100.00 World Wildlife Foundation: \$100.00

Page: 1 of 1

Page Size: 336

Refresh

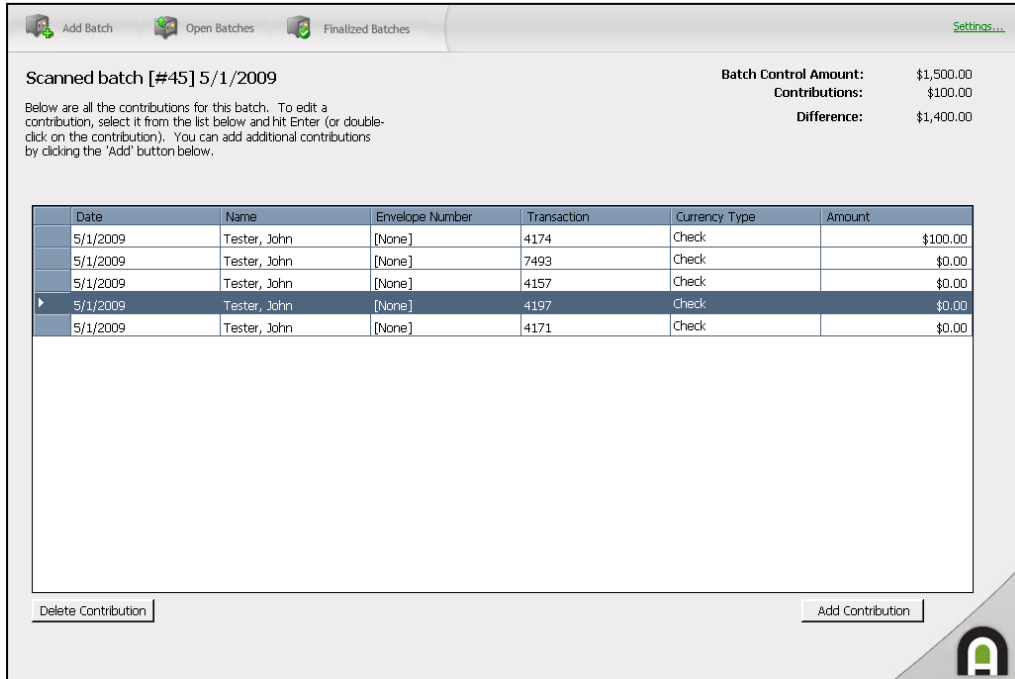
1 Contribution(s)

Reassign Person...

Batch Summary

The final page shows a summary list of the contributions for this batch. If you wish to remove/add contributions to this batch, click the corresponding Delete Contribution or Add Contribution button in bottom portion of the page as shown below.

Batch List



The screenshot shows the 'Batch List' window. At the top, there are three tabs: 'Add Batch', 'Open Batches', and 'Finalized Batches'. The 'Open Batches' tab is selected. Below the tabs, the window title is 'Scanned batch [#45] 5/1/2009'. To the right, there is a summary of the batch control amounts:

Batch Control Amount:	\$1,500.00
Contributions:	\$100.00
Difference:	\$1,400.00

Below the summary, there is a text box that reads: 'Below are all the contributions for this batch. To edit a contribution, select it from the list below and hit Enter (or double-click on the contribution). You can add additional contributions by clicking the 'Add' button below.'

The main area of the window contains a table with the following data:

Date	Name	Envelope Number	Transaction	Currency Type	Amount
5/1/2009	Tester, John	[None]	4174	Check	\$100.00
5/1/2009	Tester, John	[None]	7493	Check	\$0.00
5/1/2009	Tester, John	[None]	4157	Check	\$0.00
5/1/2009	Tester, John	[None]	4197	Check	\$0.00
5/1/2009	Tester, John	[None]	4171	Check	\$0.00

At the bottom of the window, there are two buttons: 'Delete Contribution' on the left and 'Add Contribution' on the right. A home icon is located in the bottom right corner.

- If you want to add a new batch, click the Add Batch button in the top left.
- Click the Open Batches button to show the batch list page that shows any non-finalized batch.

Steps to create a enter a Shelby Teller batch:

- 7) Click **Contributions Entry**.
- 8) Enter a **batch name**, **batch date**, and **control amount**.

Contribution Entry

This is a new page.

Batch Name	General Tithe
Batch Date	3/4/2012
Control Amount	500.00
Choose file to import	<input type="button" value="Choose File"/> No file chosen

- 9) Click **Choose File** button.
- 10) Locate and upload Shelby Teller XML file.
- 11) Click **Edit Details** to review and/or edit each contribution.

Using an existing record

General Tithe - 1413

Detailed info about a Batch

Details	Funds	Missions
Name General Tithe	General Tithing \$2,300.00	Missions Total \$0.00
Batch Date 8/1/2012 12:00 AM	Fund Total \$2,300.00	
Control Amount \$3,671.00		
Finalized No		
Type Unknown		

12) Click the **Next** button.

Contribution Entry

Batch Name

Batch Date

Control Amount

General Tithe

8/1/2012

3671.00

Cancel

Next >

Add New Contribution
Save Batch

13) From this page, you can review and adjust each contribution.

Contribution Entry

Person Greer, Beck Add New Person

Contribution Date 5/6/2011

Payment Type Check

Check # 2456

Amount \$ 0.00

Memo 601 : 2

Control Amount \$3,671.00

Contributions \$2,300.00

Difference \$1,371.00

Save Batch

Save Contribution

Detail	Date	Name	Type	Amount
2456	5/6/2011	Beck Greer	Check	\$1,000.00
2458	5/6/2011	Beck Greer	Check	\$1,000.00
2459	5/6/2011	Beck Greer	Check	\$100.00
2453	5/6/2011	Beck Greer	Check	\$50.00
2457	5/6/2011	Beck Greer	Check	\$50.00
2454	5/6/2011	Beck Greer	Check	\$100.00

Add New Contribution

Cancel

Save Contribution

14) Once you review and/or adjust each contribution, select the **Save Batch** button.

You can select a batch to Edit, Finalize, or Delete.

Batch List

Batch List

Below are all the batches that have not yet been finalized. To view and update the contributions for a batch, select it from the list below and hit Enter (or double-click on the batch).

Batch ID	Label	Date	Created By	Contributions	Contribution Total	Control Amount	Difference
38	[Unnamed Batch]	10/9/2007	SHELBYINC01\c...	2	\$50.00	\$50.00	\$0.00

When you finalize a batch, you have the option to post attendance to an open Occurrence. Arena marks attendance for the contributor. *See your Arena Administrator if this option is not available.*

Mark Attendance

Confirm




Are you sure you want to finalize 1 batch(es)?

☐ Print Batch Report

Mark Attendance

- 2009 Back to School Outing 6/15/2009
- Sunday 9:30am Service 6/22/2009
- Adult Group Check-In 6/22/2009
- 5th Grade 6/22/2009
- PDO 6/22/2009
- Nursery 6/22/2009
- Nursery 6/22/2009

The screenshot shows a Windows-style dialog box titled "Export Batch". It has standard window controls (minimize, maximize, close) in the top right corner. The main area contains three input fields: "Journal Type" with a dropdown arrow, "Accounting Period" with a text box, and "Date" with a date picker showing "6/25/2011". Below these is a section labeled "Preview" which contains a table header with five columns: "Company", "Fund", "Account", "Project", and "Amount". The body of the table is currently empty. At the bottom right of the dialog is an "Export" button.

 Add Batch
  Open Batches
  Finalized Batches

1

2

3

[Settings...](#)

Finalized Batch List

Below are all the batches that have been finalized. You can copy or export a finalized batch.

	Batch ID	Label	Date	Created By	Contributions	Contribution Total	Control Amount	Difference
	581	Missions	6/25/2011	lindaj	0	\$0.00	\$0.00	\$0.00

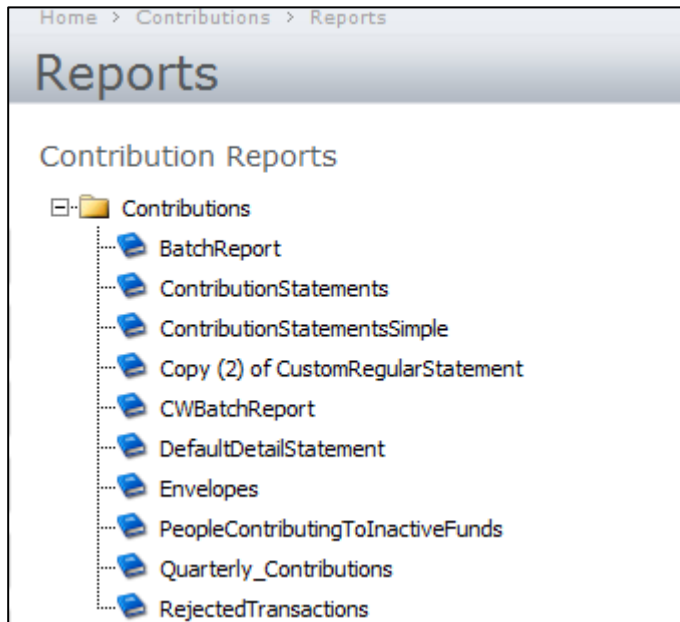
Copy

Export



Reports

Prebuilt reports enable you to run reports such as Contributions Statements and Batch Reports.



To send Contributions via email, refer to the Mailing section of this manual.












Missions

Missions are a way to track the details involving Mission Trips. Arena can track the location, schedule, team, local facilitators, supporters, travelers, and even a participant's financial ability to pay for the trip.




What you will need:

- ☐ Setup the Payment Gateway, if needed. **See your Arena Administrator.**
- ☐ Create the appropriate Fund for this Mission Trip.
- ☐ Create the Mission Trip.
- ☐ Create at least one Contribution Fund in order to create a Mission Trip. *Refer to the Fund Management section in Contributions.*
- ☐ Review your organization's Mission Team approval process for the purpose of allowing additional payment to be made towards a Team Member.


Mission List

ID	Mission	Purpose	Coordinator	Team Members	Departure Date	Return Date	Status	
1	My Mission		Smith, Bud	2			Active	 
3	Jesse's Trip	Evangelism		0	3/13/2009	3/28/2009	Active	 
4	Mission Test	Social Ministry		1	6/1/2009	10/19/2009	Active	 
7	Halloween Mission	Vampire Hunting	 Weinberg, Dan	2	10/31/2009	11/30/2009	Bloodthirsty	 
Page: 1 2 of 2 Page Size: 4 Refresh 7 Mission(s)								

The Mission List will show the Mission Trip name, the departure and return dates, a Delete button, and an Add button. From this page, you can do the following:

- Click on a [Mission Trip](#) hyperlink to edit.
- Click  to **add** a New Mission Trip. If no missions are currently in the list, click the [Add...](#) link.
- Click the copy  icon to copy a mission trip. The copies will include Custom Field, Communications, Packing Lists, Documents, and General Information from the original Mission Trip.
- Click  to delete a Mission Trip.

Steps to Create a Mission Trip:

- 1) Click the  button to add a new Mission. If no missions are currently in the list, click the [Add...](#) link.
- 2) Click **Edit**.
- 3) Enter **details** for this Mission Trip.

Mission Details

Mission Details

General Information

Trip Name

Country

Region

City

Departure Date

Return Date

Trip Purpose

Trip Status

Trip Coordinator

Description

Registration Setup

Min Team Size

Max Team Size

Min Age

Deposit Amount

Cost Per Team Member

Registration Deadline

Deposit Due on Registration Deadline?

Registration Deposit 1 Deadline

Registration Deposit 1

Registration Deposit 2 Deadline

Registration Deposit 2

Financial Setup

Beginning Balance







CN Fund


GL Project Code

Trip Contributions

Contributors

Save Cancel

- **Trip Name** – Enter the name of the Mission Trip.
- **Country** – Choose the destination country of the trip from the drop-down menu. If the country is not in the list, click the green  icon to add a new Country.
- **Region** – Choose the country's region in the drop-down menu. If the desired region is not in the list, click the green  icon to add a new Region.
- **City** – Choose the destination city from the drop-down menu. If the desired city is not in the list, click the green  icon to add a new City.
- **Departure Date** – Click the calendar icon  to choose the date the trip starts. *To hide a trip from "public" view, set the "Departure Date" to a prior date.*
- **Return Date** – Click the calendar icon  to choose the date the trip members will be returning.
- **Trip Purpose** – Choose the reason for the trip from the drop-down menu. If the desired reason is not in the list, click the green  icon to add a new Purpose. *Each Trip Purpose type has a 50-character limit. See your Arena Administrator to set security by Trip Purpose.*
- **Trip Status** – Choose a trip status. Active and inactive are default statuses.

- **Trip Coordinator** – Enter the name of the coordinator of the trip. This person is the “Leader” of the trip, but is not necessarily a Team Member. Begin typing the last name of the intended person, and the drop-down will filter the available persons. Once the desired person displays in the list, click on that name to select it.
- **Description** – Enter a description of the Trip, including any itinerary.
- **Min Team Size** – Enter the minimum number of people for the Team.
- **Max Team Size** – Enter the maximum number of people for the Team.
- **Min Age** – Enter the minimum age a Team Member can be in order to go on the trip.
- **Deposit Amount** – Enter the amount (if applicable) that each Team Member must provide up front to go on the trip.
- **Cost Per Team Member** – Enter the total amount (if applicable) each Team Member must provide to go on the trip. You can use *commas and decimals in any cost fields associated with Missions. Any other character will not display.*
- **Registration Deadline** – Click the calendar icon  to choose the last day a Team Member can register to go on the trip.
- **Deposit Due on Registration Deadline** – Check this box if box is due at registration.
- **Registration Deposit 1 Deadline** – Enter the due date for the first deposit, if applicable.
- **Registration Deposit 1** – Enter the amount of the first deposit.
- **Registration Deposit 2 Deadline** – Enter the due date for the second deposit, if applicable.
- **Registration Deposit 2** – Enter the amount of the second deposit.



Arena can automatically send reminder e-mails, using the deadline dates entered. *See your Arena Administrator.*

- **Beginning Balance** – Enter the beginning balance (if applicable).
- **CN Fund** – Choose the Contribution Fund from the drop-down menu. *If the desired Fund does not show in the list, you will need to add the Fund on the Fund Management page under Contributions.*
- **GL Project Code** – Enter the GL expense account designated for the mission trip, if applicable.
- **Trip Contributors** – Lists Contributors who have contributed to the Mission trip through Contributions.

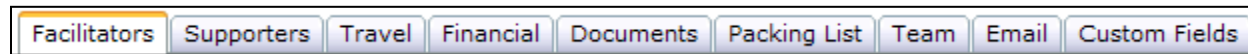
4) Click **Save**.

5) Now you can enter other details for this Mission Trip, using the tabs below the Mission Trip details.

Mission Details

Editing or creating a new Mission Trip will display the Mission Details page. The details will display with a series of tabs along the bottom containing additional information about the trip. When creating a new trip, all tabs display after you save the details. Click the [Edit](#) link at the upper right to begin editing the Mission Details. The figure below shows the Mission Trip details and the tabs, respectively.

Mission Detail Tabs




- **Facilitators** – People who are assisting with the Mission Trip at the trip’s destination. *These records are not stored in the Arena DB.*
- **Supporters** – People who are assisting with the Mission Trip from the organization’s location. *These records are stored in the Arena DB.*
- **Travel** – This is a simple expense/income register for the trip such as, ground transportation and hotel accommodations.
- **Financial** – This is where you can track trip expenses and income, not incurred by the Team.
- **Documents** – You can upload associated documents such as a trip application form.
- **Packing List** – This is where to list items to bring on the trip.
- **Team** – The trip Team Members and Leaders list on this tab.
- **Email** – This is where you create a template for the e-mail sent to registrants, once individuals register.
- **Custom Fields** – You can create custom fields to use during online registration.

- Include a standard packing list as a Document and include with the e-mail, and use Packing List to alert team members to bring unique items to this trip.
- To leave a trip online to collect donations beyond the trip date, set the “Departure Date” one day after the last day donations are accepted.
- To prevent people from registering themselves to a trip, set the “Max Team Size” value greater than zero, and the “Max Team Size” value smaller than the number of team members currently enrolled for a trip. i.e., Enroll at least one person and set Max Team Size to 1. You may add team members even if you have reached the “Max Team Size”.



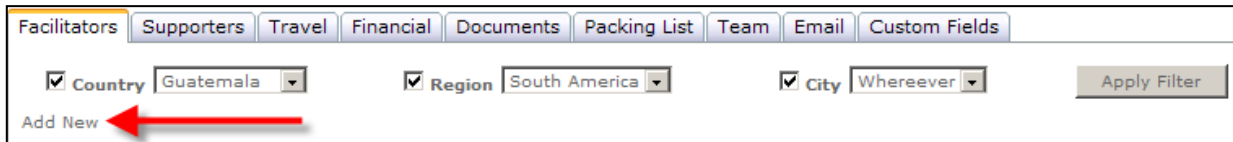
FACILITATORS TAB

A **Facilitator list** will display each Facilitator's name, phone number, e-mail address, website, country, region, and city. The delete button  will remove a facilitator from the list.

Steps to Add a Facilitator:

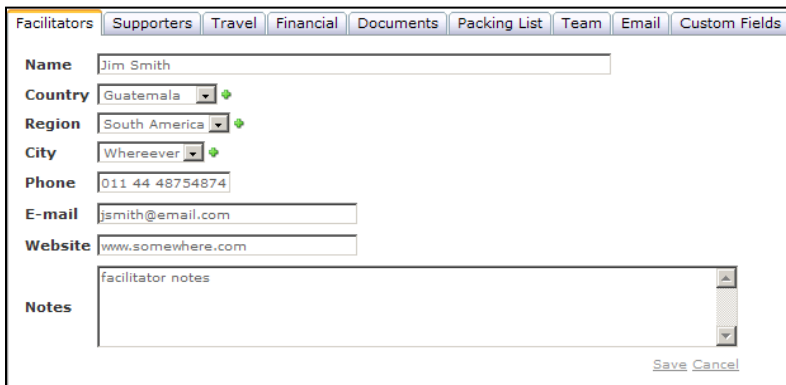
- 1) Click **Add New**.




New Facilitator



- 2) Complete the fields, as needed.

Field Facilitator details



- **Name** – Enter the name of the Facilitator you want to add.
- **Country** – Choose the country of the Facilitator from the drop-down menu. If the country is not in the list, click the green  icon to add a new Country.
- **Region** – Choose the region of the Facilitator from the drop-down menu. If the region is not in the list, click the green  icon to add a new Region.
- **City** – Choose the city of the Facilitator from the drop-down menu. If the city is not in the list, click the green  icon to add a new City.
- **Phone** – Enter the phone number of the Facilitator. You can enter and format international phone numbers. *10-digit phone numbers automatically format.*
- **E-mail** – Enter the e-mail address of the Facilitator.
- **Website** – Enter the website URL for the Facilitator.
- **Notes** – Enter any notes about this Facilitator.

- 3) Click **Save** when done.



Adding Facilitators will not add the person to the Arena database, therefore Facilitators are not searchable within Arena, nor can they be included in bulk e-mails.

SUPPORTERS TAB

The **Supporters** list displays each supporter's name, address, phone number, e-mail address, and the type of support the person provides. To add a Supporter, the individual must first be in the database. If he or she is not in the database, you can add them using the **Add New Family** utility under **Membership**. Financial Supporters entered through Contributions will also display on this tab.

Steps to Add a Supporter:

- 1) Click **Add New**.
- 2) Complete the fields, as needed.

Supporter Details

- **Supporter** – Begin typing the last name of the intended Supporter, and the drop-down will filter the available persons. Once the desired person displays in the list, click on that name to select it.
- **Supporter Type** – Choose the type of support the supporter provides for the trip from the drop-down menu. If the type is not in the list, click the green + icon to add a new Supporter Type.
- **Notes** – Enter any notes about this Supporter.


- 3) Click **Save** when done.

Supporters

	Name	Address	Phone	E-mail	Supporter Type
<input type="checkbox"/>	Tester, John	1234 America Drive	(901) 789-4561	jtester@gmail.com	Contributor
<input type="checkbox"/>	Arnold, Judith	1435 Collierville Arlington N	(901) 861-2280	cvcoleman@comcast.net	T-shirts

The delete button will remove a supporter from the list. Using the icons, you can add a new Supporter, Bulk Update the selected Supporters, e-mail selected Supporters, produce labels for the selected Supporters or export the list of Supports to Excel. Click the to add a new Supporter, the below page the **Supporter Details**, as shown below.

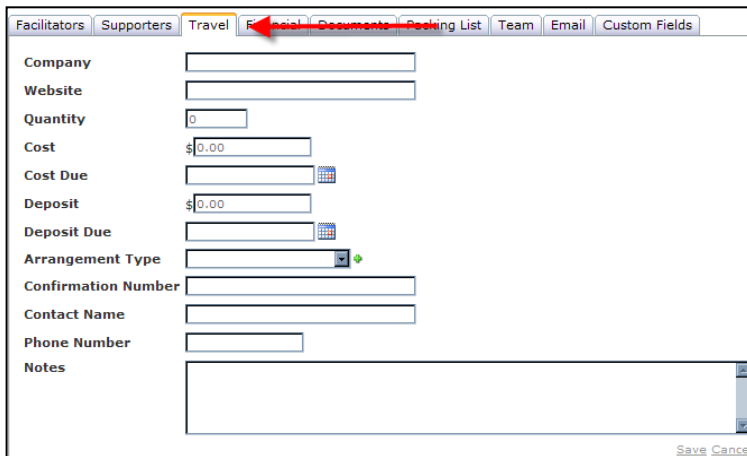
TRAVEL TAB


The Travel list shows details relating to the travel arrangements for this trip. This includes information about the company, website, quantity of transportation modes, cost, cost due date, deposit, deposit due date, arrangement type, confirmation number, contact name, contact phone number for the arrangement and notes. The delete button  will remove an arrangement from the list. Click the Add icon to create a new Arrangement, which will open Travel details, shown below.

Steps to Add a New Travel Arrangement:

- 1) Click **Add New**.
- 2) Complete the fields, as needed.

Travel Arrangement



- **Company** – Enter the name of the company providing the travel arrangement.
- **Website** – Enter the website (if applicable) of the company.
- **Quantity** – Enter the quantity of the modes of transportation, such as a number of buses.
- **Cost** – Enter the cost of this Arrangement.
- **Cost Due** – Enter the date the total Cost is due.
- **Deposit** – Enter the deposit amount for the Mission trip.
- **Deposit Date** – Enter the date the Deposit is due.
- **Arrangement Type** – Choose an Arrangement Type from the drop-down menu. If the type is not in the list, click the green  icon to add a new Arrangement Type.
- **Confirmation Number** – Enter the confirmation number (if applicable) for this Arrangement.
- **Contact Name** – Enter the name of the contact at the company.
- **Phone Number** – Enter the phone number of the company contact.
- **Notes** – Enter any notes about this arrangement.

- 3) Click **Save**.

FINANCIAL INFORMATION TAB

Use this tab to track incomes and expenses for each mission trip.

Steps to Add Financial Information:

- 1) Click **Add New**.
- 2) Choose Expense or Income.
- 3) Complete fields, as needed.

Financial Item

- **Expense/Income** – Choose whether this item is an expense or income for the trip.
- **Vendor** – Enter the name of the vendor providing the item(s).
- **Transaction Date** – Click the calendar icon to choose the date of the transaction.
- **Amount** – Enter the dollar value of the item.
- **Register Type** – Choose a register type from the drop-down menu. If the type is not in the list, click the green icon to add a new register type.
- **Check Number** – Enter the check number used to pay for the item.
- **Invoice Number** – Enter the invoice number for the item.

- 4) Click **Save**.

Financial Information

Vendor	Description	Date	Amount	Type	Check #	Invoice #	Expense/Income
Al Travel	Deposit	4/24/2008	\$2,500.00	Deposit	2874	78948744	Expense
Shuttle Express	Deposit	5/8/2008	\$100.00	Deposit	5764	USSP18748	Expense
John Smith	Trip Donation	5/19/2008	\$750.00	Deposit	9845		Income

Page: 1 of 1 Page Size: 122 Refresh

DOCUMENTS

Use this tab to manage documents associated with this mission trip. You can indicate documents to include with registration.

Steps to Add a New Document:

- 1) Click **Add New**.
- 2) Complete fields, as desired.

New Document

- **Title** – Enter the title of the document.
- **Description** – Enter a description for the document.
- **Document** – Click the **Browse** button to search for the document file. The file can be a .text, .doc, .pdf, or image file.
- **Required** – Check the box if this document is required to go on the trip.
- **Include in Registration E-mail** – Check the box if the document should be an attachment sent in the Registration E-mail for Team Members.
- **Due Date** – Click the calendar icon to choose the date the document is due back from the trip registrant.
- **Reminder Date** – Click the calendar icon to choose the date to send a reminder e-mail to the approved trip registrant.
- **Notes** – Enter any notes pertaining to this document.

- 3) Click **Save**.

Mission Documents

Facilitators Supporters Travel Financial Documents Packing List Team Email Custom Fields						
Title	Description	Required	Include In Email	Due Date	Reminder Date	
Medical Release Form	Medical Release Form	✓	✓	6/3/2008	5/23/2008	✗
Permission Form	asdjdaoining	✓	✓	6/3/2008	5/23/2008	✗

PACKING LIST

Use this tab to track items to bring on the mission trip.

Steps to Add a Packing List Item:

- 1) Click **Add New**.
- 2) Complete fields, as desired.

Packing List Item Entry

Facilitators	Supporters	Travel	Financial	Documents	Packing List	Team	Email	Custom Fields
<p>Item <input type="text" value="Back Pack"/></p> <p>Description <input type="text" value="Any size back pack that will fit all day-items while working"/></p> <p>Required <input checked="" type="checkbox"/></p> <p style="text-align: right;">Save Cancel</p>								

- **Item** – Enter the name of the object.
- **Description** – Enter a description of the item.
- **Required** – Check if the item is required for the trip.

- 3) Click **Save**.

Packing List

Facilitators	Supporters	Travel	Financial	Documents	Packing List	Team	Email	Custom Fields
<u>Item</u>	<u>Description</u>						<u>Required</u>	
Back Pack	Any size back pack that will fit all day-items while working						✓ ✗	

TEAM

The **Team Member List** displays the team member's name, their trip roles, if they have met any requirements to be a team member, their balance due, applied discounts, and Contributors. Clicking on team member's [name](#) will open the Team Member Details page for that member. Individuals can also register for a Mission Trip by using the Online Trip Registration module/control on your organization's Arena-managed website.

Steps to Add a Team Member:

- 1) Click **Add New**.
- 2) Complete fields, as needed.

New Team Member

- **Team Member** – Click [Change...](#) to search for the individual from the database. As you type the first and/or last name, the drop-down will filter the available persons. Once the desired person displays in the list, click on that name to select it. Team Members must already exist in the Arena database.
- **Trip Role** – Select the role for this team member. To add a new role, click the plus icon to create a new Trip Role.
- **Requirements** – Check the box if the team member has met the requirements to go on the mission.
- **Approved** – Click this box if you have approved this individual as a member of the Mission Trip. *Once you approve a team member, the team member or others can make payments for him on your Arena-managed website.*
- **Discount Amount** – Enter the dollar amount of the discount for this team member.

- 3) Click **Save**.

Mission Team

Facilitators Supporters Travel Financial Documents Packing List Team Email Custom Fields							
<input type="checkbox"/>	Name	Trip Role	Requirements Met	Balance Due	Discount	Contributors	
<input type="checkbox"/>	Coleman, Chris	Trip Member		\$730.00	\$0.00	John Tester - \$100.00 George Bailey - \$100.00 John Tester - \$20.00 Morticia Addams - \$250.00	
<input type="checkbox"/>	Coleman, Valerie	Trip Leader		\$730.00	\$0.00	John Tester - \$100.00 George Bailey - \$100.00 John Tester - \$20.00 Morticia Addams - \$250.00	
<input type="checkbox"/>	Tester, John			\$1,000.00	\$0.00	John Tester - \$200.00	

Page: 1 of 1 Page Size: 122 Refresh 7 Team Member(s)

Team Member List

From the Team tab, you can add team members, use Bulk Update, email, print labels, and export the selected records to Excel. You can also view the Contributors to each Team member. You can enter Mission contributions through Contributions and/or individuals can make payment for approved team members through your Arena-managed website.

Team Member List

Facilitators Supporters Travel Financial Documents Packing List Team Email Custom Fields								
* means anonymous gift								
<input type="checkbox"/>	Name	Trip Role	Requirements Met	Balance Due	Discount	Contributors	Approved	Active
<input type="checkbox"/>	Doe, Marvin	Trip Leader	✓	\$500.00	\$0.00		✓	✓
<input type="checkbox"/>	Sample, Jane	Trip Leader	✓	\$450.00	\$0.00	Susan Doe - \$50.00	✓	✓
<input type="checkbox"/>	Test, Ryan	Trip Member	✓	\$450.00	\$0.00	Susan Doe - \$50.00	✓	✓
Page: 1 of 1 Page Size: 151 Refresh 3 Team Member(s)								

Team Member Details

Once someone is a team member, you can click on his [name](#) to change the role, enter discounts, approve him, resend the Registration Confirmation e-mail or reassign a contribution to a different team member.

Team Member Details

Facilitators Supporters Travel Financial Documents Packing List Team Email Custom Fields											
Team Member	Jane Sample			Registration Confirmation Email		Resend					
Trip Role	Trip Leader			Contributors		Susan Doe - \$50.00					
Requirements Met	<input checked="" type="checkbox"/>					Reassign...					
Discount Amount	\$0.00										
Approved	<input checked="" type="checkbox"/>										
Active	<input checked="" type="checkbox"/>										
Save Cancel											

Steps to make a payment towards a Trip Member or the Mission Trip:

- 1) Choose a **Mission Trip**, if more than one is available. *The **Online Trip Registration** module/control allows the logged-in user to apply his gift to the Mission itself or a specific Team Member, as shown below.*
- 2) Choose whether to register **Yourself** or a **Family Member** as a Team Member of the trip, or if you are contributing to the mission. *Only Adult members of a family can register other family members.*

Mission Trip Registration

Mission Trip First Mission ▼

Select an Action

☐ Register yourself or a family member

☒ Contribute to the mission trip or an individual

Trip Attendee

First Name:

Last Name:

Payment Amount

☐ Deposit Amount: \$123.00

☐ Total Registration Cost: \$12.00

☐ Balance Due: \$12.00

☒ Other Amount: \$

- 3) Enter the **First** and **Last names** of the Trip Member for whom you want to make a payment. Leave the name fields blank to apply the entry to the Mission itself.
- 4) Click the **Verify Attendee** button to verify the Trip Member exists for the chosen mission.
- 5) Enter your payment options and click **Next**.
- 6) They will proceed with entering in payment information, as determined by your organization.

CUSTOM FIELDS TAB

Use this tab to create custom fields or select custom field groups to include on the on-line registration page.

Mission Custom Fields

Facilitators	Supporters	Travel	Financial	Documents	Packing List	Team	Email	Custom Fields
Custom Fields								
Label	Visible	Required	Read Only	Show On List	Type	Qualifier		
Field One	✓				Radio List	Yes, No	⬅ ➡	✖
What What	✓				Dropdown List	What, What	⬅ ➡	✖
Page: 1 of 1 Page Size: 151 Refresh 2 Field(s)								
Custom Field Groups								
Category	Module	Attributes						
Apparel	Tee-Shirt	Tee-Shirt Size (Arena.Portal.UI.FieldTypes.DropDownField) Color (Arena.Portal.UI.FieldTypes.RadioField)						
Apparel	DW Clothes	DW Tee Shirt (Arena.Portal.UI.FieldTypes.DropDownField) DW Color (Arena.Portal.UI.FieldTypes.RadioField) Space Test (Arena.Portal.UI.FieldTypes.CheckBoxField)						
Add New Field Module: ▼ Add								

Custom Filed Entry

Custom Field

Title

Title Location

Type

Rows

Pixels Wide

Visible


Required

Read Only

Show On List

Save

Cancel

Custom Fields are listed in the order in which they appear on this tab. Use the  icon to change the order.



Assignments

Assignments are Arena's request tracking system. You can use assignments to track many different types of requests such as IT, Operations, Comfort Care Ministries, etc. You can also use Assignments to begin a Workflow from the Person Detail page.

Assignment Selection

Select an assignment area from the list below



Guest Workflow

This Assignment Workflow is to be used for ALL church guests who complete a guest card.



Comfort Care Assignments

This Assignment is for hospital and home care visits of members by Pastoral staff.



IT Request

Default IT Request area



Operations Requests


For requests for moves or facility break / fix requests.

Assignment Types

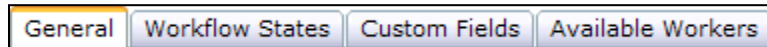
Use the Assignment Type page to create various Assignment Types, using Child Assignment as desired to organize Assignments. You also want to verify, with your organization's Arena Administrator, the below features are working as desired. *The hierarchy of Assignments works similar to Tags. Security inherits from the parent level of an assignment type.*

- Turn on ArenaMailQueue Agent.
- Turn on ArenaAssignment/ProcessState Agent, if using Workflow States.
- Create Assignment System E-mails.

Steps to Create an Assignment Type:

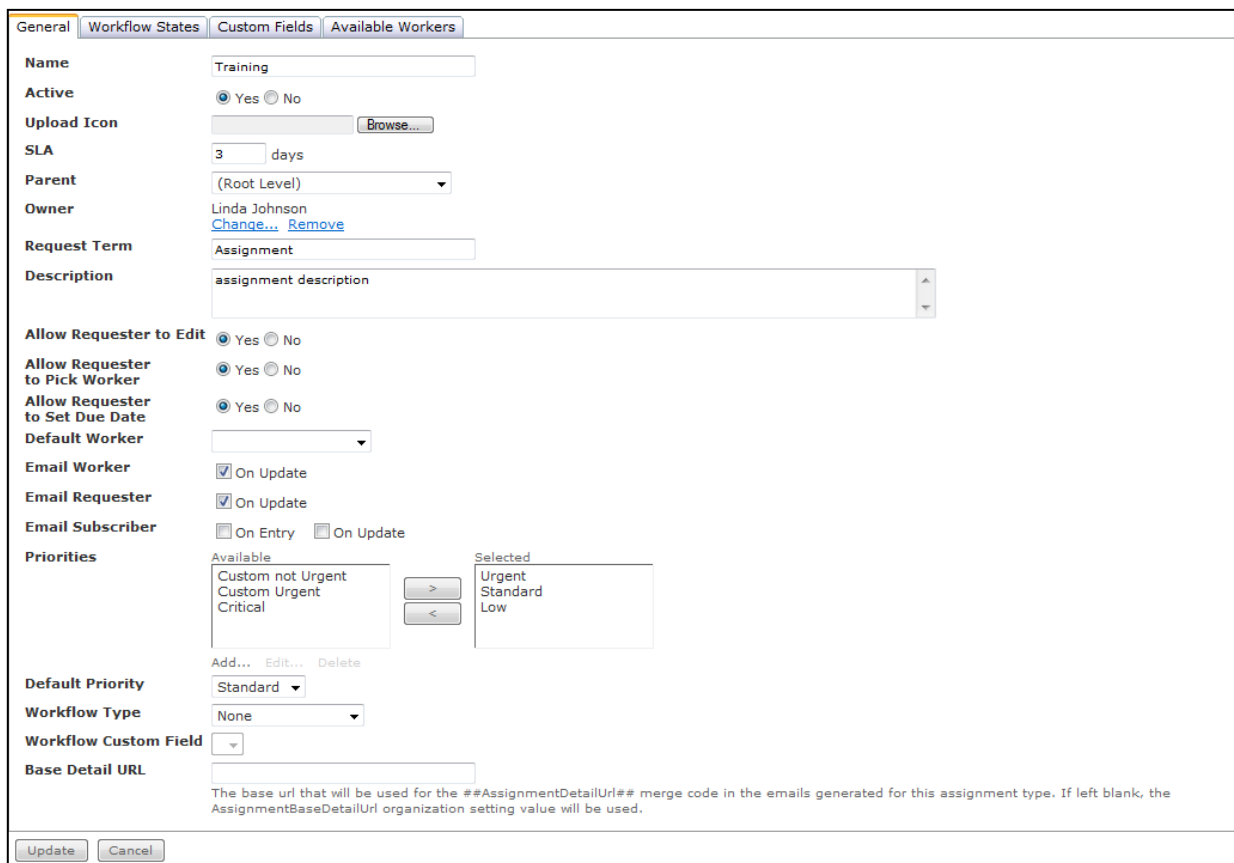
- 1) Go to Assignment → **Assignment Types**.
- 2) Click the  **Add** Assignment icon. *While it is natural to want to complete the tabs in the order in which they appear you may want to add the Available Workers and Custom Fields first.*

Assignment Tabs



- 3) Complete **General** tab fields, as desired.

Assignment Type - General Information


 A screenshot of the 'Assignment Type - General Information' form. The form has four tabs: 'General', 'Workflow States', 'Custom Fields', and 'Available Workers'. The 'General' tab is active. The form contains the following fields and controls:


- Name:** Text input field with 'Training' entered.
- Active:** Radio buttons for 'Yes' (selected) and 'No'.
- Upload Icon:** Text input field with a 'Browse...' button.
- SLA:** Text input field with '3' and a 'days' label.
- Parent:** Dropdown menu with '(Root Level)' selected.
- Owner:** Text input field with 'Linda Johnson' and links for 'Change...' and 'Remove'.
- Request Term:** Text input field with 'Assignment'.
- Description:** Text area with 'assignment description'.
- Allow Requester to Edit:** Radio buttons for 'Yes' (selected) and 'No'.
- Allow Requester to Pick Worker:** Radio buttons for 'Yes' (selected) and 'No'.
- Allow Requester to Set Due Date:** Radio buttons for 'Yes' (selected) and 'No'.
- Default Worker:** Dropdown menu.
- Email Worker:** Checkboxes for 'On Update' (checked) and 'On Entry'.
- Email Requester:** Checkboxes for 'On Update' (checked) and 'On Entry'.
- Email Subscriber:** Checkboxes for 'On Entry' and 'On Update'.
- Priorities:** Two lists. 'Available' contains 'Custom not Urgent', 'Custom Urgent', and 'Critical'. 'Selected' contains 'Urgent', 'Standard', and 'Low'. There are '>' and '<' buttons between the lists.
- Default Priority:** Dropdown menu with 'Standard' selected.
- Workflow Type:** Dropdown menu with 'None' selected.
- Workflow Custom Field:** Dropdown menu.
- Base Detail URL:** Text input field.

 At the bottom of the form are 'Update' and 'Cancel' buttons.

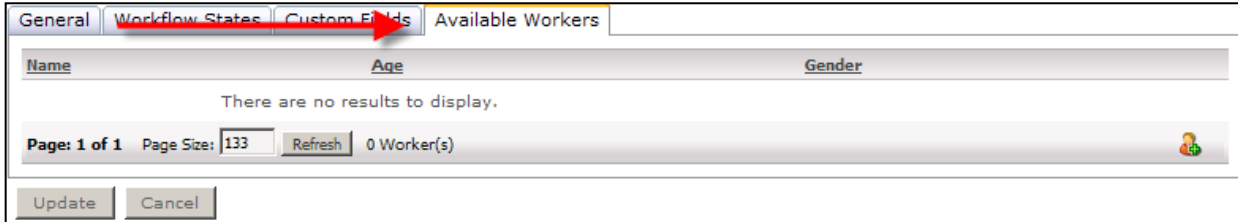
- **Name** – The name for the Assignment.
- **Active** – Indicates if the Assignment is active.
- **Upload Icon** – The icon image that will show next to the Assignment on the Assignment Entry page.
- **SLA** – (Service Level Agreement) The number of days to the worker is complete the assignment.
- **Parent** – This shows the assignment level structure.
- **Owner** – This will default to the person creating the assignment type. You can click [Change](#) to select a different owner from the database.
- **Request Term** – This caption will show on the Assignment Entry.
- **Description** – This is the description of the assignment task.
- **Allows Requestor to Edit** – Selecting yes allows the requestor to edit the assignment. **Allow Requester to Pick Worker** – Selecting “Yes” allows the requestor to select the worker. If “No” is selected, you will need to determine how the worker will be selected for this Assignment Type.
- **Allow Requester to Set Due Date** – If this is set to “Yes”, then a date picker displays on the Assignment Entry page. *If you set SLA on the assignment type, the due date will default to today + SLA days, but the user will be able to change the date.* If this set to “No” (default), then it will act normally and use the SLA days to calculate the due date.
- **Default Worker (Default)** – If this is set to “No”, no options are given. If you select “Yes”, you have the option to select Round Robin, Load Balance or a specific Worker.
- **Round Robin**—Select this option if want Arena to always assign the items "evenly", where each worker receives one task before the first worker receives his second. *Select this option if your objective is to assign the tasks "evenly", where each worker receives one task before the first worker receives his second.*
- **Load Balance**—Select this option if you want Arena to assign the items to the worker with the lowest total load of open assignments. *At a specific snapshot in time (the moment you create a new assignment), Arena looks at the current 'load' of each worker and allocates the new assignment to the worker with the lowest total load of open assignments.*
- **Specific Work**—Select this option if you want the Arena to assign the items to worker.
- **Email Worker** (on update) – Check this box if you would like to e-mail the worker when updates are made to the assignment type. *If you do not check this box, Arena will still e-mail the worker when a user creates an assignment for the assignment type.*
- **Email Requestor** (on update) – Check this box if you would like to e-mail the requestor when updates are made to the assignment type, not upon entry or close. *If you do not check this box, Arena will still e-mail the requestor when a user creates an assignment for the assignment type.* If the requestor is the same person who is updating the assignment, they will not receive an e-mail. An update is considered any change to an active assignment such as adding notes or changing the state of an assignment workflow.
- **Email Subscriber** – Check the appropriate box to e-mail anyone who has subscribed to the assignment, upon entry and update.
- **Priorities** – This is the listing of available and selected priorities for this assignment. Select from the Available box and click the single right-arrow to move it to the Selected box. Click [Add](#) to create more priorities.
- **Default Priority** – This is the default priority used for the Assignment Entry.
- **Workflow Type** – If using Workflow, select Person Detail. If you want to add Workflow to Calling Campaigns, select Calling Campaigns and set Person ID Custom Field.

- **Workflow Custom Field** – If using Workflow, select Person. *You will need to create the Custom Field first so that it is available on the General tab.*
- **Base Detail URL** – This is used for the ##AssignmentDetailUrl## merge code in the e-mails generated for this assignment type. If left blank, the AssignmentBaseDetailUrl organization setting value is used.

4) Click the **Available Workers** tab.

5) Click the **Add New Worker**  icon to select the available workers for this assignment.

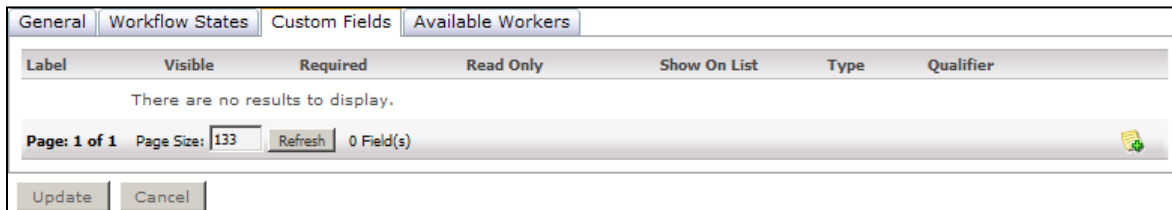
Assignment Type – Available Workers



Select the **Custom Fields** tab to create custom fields for this Assignment Type. *If using Workflow States, the Person Type, value 7, is required.*

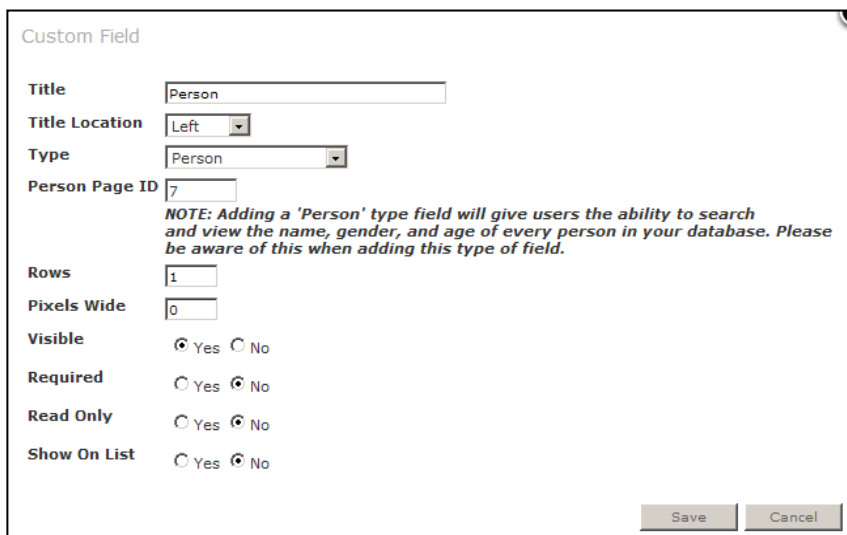
6) Click the **Add NewField**  icon to create a new custom field, as shown below.

Assignment Type - Custom Fields



7) Complete **Field**, as desired. *Some Types require additional setup information.*

Custom Field


















- **Title** – Enter a name for this custom field.
- **Title Location** – Select the location where the title should display.
- **Type** – Select the desired custom field. *Some types require additional setup information.* Below are the available Types:
 - **Address** – This allows the requester to enter in an address.
 - **Area** – This allows the requester to select and Area. *See Areas in this manual.*
 - **Checkbox** – This allows the requester to make multiple selections from a single list. Enter each item, separated by a comma.
 - **Custom Query** – This is where you can enter a SQL statement.
 - **Date** – This allows the requester to enter a date in MM/DD/YYYY format.
 - **Document** – This allows the requester to upload a document.
 - **Drop-down List** – This allows the requester to make a single selection for a drop-down list. Enter items, separated by a comma.
 - **Lookup Type** – This allows the requester to select from an existing list of items from Lookups (See your Arena Administrator).
 - **Person** – This allows the requester to select a person from the database. *The default Page ID is 7.*
 - **Phone Number** – This allows the requester to enter in a phone number. Arena will format 10-digit phone numbers. You can enter international numbers.
 - **Radio List** – This allows the requester to select a single item from several choices. Enter the items in a list form.
 - **Static HTML Content** – This allows the Assignment creator the ability to enter HTML Content.
 - **Textbox** – This allows the requestor to enter a string of text.
- **Rows** – Enter the number of rows to use for this field. *It is not necessary to change from the default.*
- **Pixels Wide** – Enter the number of pixels for this custom field. *It is not necessary to change from the default.*
- **Visible** – Select “Yes” to display this custom field on the Assignment Entry page.
- **Required** – Select “Yes” to require this custom field to be complete.
- **Read Only** – Select “Yes” if this custom field is for view purpose only; no action is required.
- **Show on List** – Select “Yes” for this custom field to be available in Lists.

8) Click **Save**.

9) Select the **Workflow States** tab. *Workflow states allow you to create a process for this Assignment Type. Workflows will vary for your organization.*

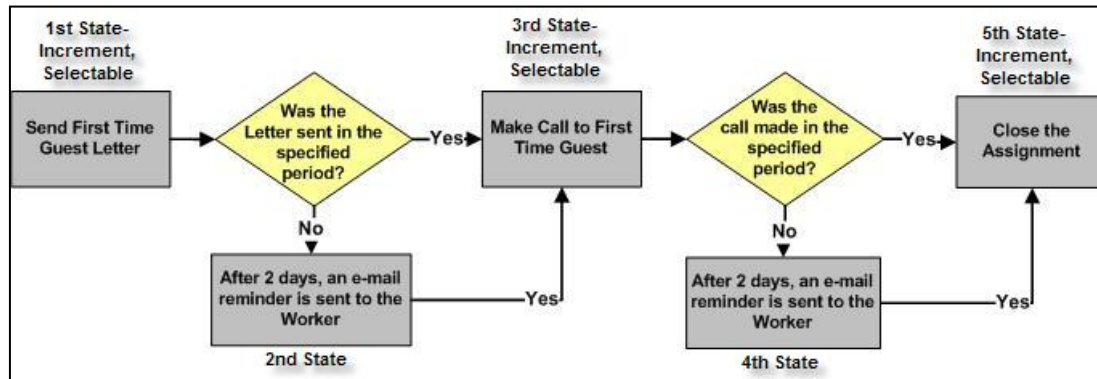
Workflow States


State	User Selectable	Action(s)	Increment State	
Send First Time Visitor Letter		[Arena] Assign Specific Worker	✓	  
First Time Visitor Letter Reminder		[Arena] Remind Worker		  
Make First Time Visitor Call	✓	Multiple...	✓	  
First Visitor Call Reminder		[Arena] Remind Worker		  
First Time Visitor Assignment is Complete	✓	[Arena] Close Assignment		  

Page: 1 of 1 Page Size: 133 Refresh 5 State(s)

Update Cancel

In this example the Workflow States for First Time Visitors are: (1) Sending a First Time Visitor letter, (2) A reminder e-mail when the State is not changed within x days, (3) Making a First Time Visitor Phone Call, (4) A reminder e-mail when the State is not changed within x days, (5) Closing the Assignment.



- 10) Select the Add New State  icon to **add** a Workflow State.
- 11) Enter a **name** for this state.
- 12) Select **User Selectable**, if desired. Check this box to indicate if the state is selectable by the user. If checked, it will show up in the State drop down box. If not, it can only be selected by Arena through a state action or if the state was incremented from a previous state.
- 13) Select **Increment State After Action**, if desired. Check this box to indicate if the Assignment should increment to the next state automatically after successfully completing the previous state.
- 14) Select the **Action** from the available drop-down to add to this assignment. You can include more than one Action for a State.

Workflow State

Workflow State

State Name

Test Workflow

User Selectable

☒

Increment State After Action

☒

Action(s)

Available

[Arena] Assign Specific Worker



[Arena] Remind Worker

[Arena] Set State After Testing Field

Selected


[Arena] Assign Specific Worker

Action Settings

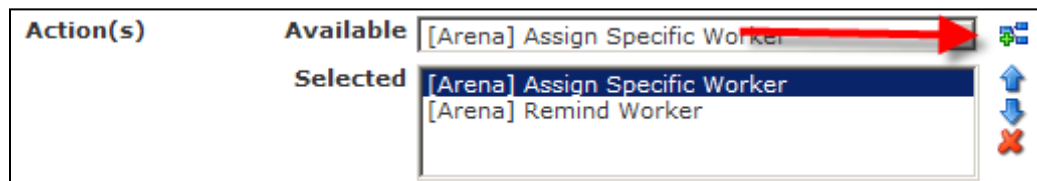
Setting Name	Setting Value
Notify Requester Should requester be notified when worker is assigned?	<input checked="" type="radio"/> True <input type="radio"/> False
Notify Worker Should worker be notified when worker is assigned?	<input checked="" type="radio"/> True <input type="radio"/> False
Worker (required) Worker that assignment should be assigned to.	Linda Johnson  

Available Workflow States are:

- **Assign Specific Worker** – Will assign to the worker that you configure for this action.
- **Assign Worker** – Will assign to the default worker that you configure on the assignment type
- **Assign Worker (Load Balanced)** – Will assign to the worker that has the fewest active assignments of the current type. *This option is only available when using Workflow.*
- **Assign Worker (Round Robin)** – Will rotate assignment between all the workers for the assignment type. *This option is only available when using Workflow.*
- **Assign Specific Worker** – Allows you to set the e-mail notifications for the worker and the requestor, as well as the worker to whom this assignment is to be assigned.
- **Assign Worker (Default)** – Allows you to set the e-mail notifications for the worker and the requestor for the default worker option.
- **Assign Worker (Load Balanced)** – Allows you to set the e-mail notifications for the worker and the requestor for the Load Balance worker option
- **Assign Worker (Round Robin)** - Allows you to set the e-mail notifications for the worker and the requestor for the Round Robin worker option.
- **Close Assignment** – Allows you to set the e-mail notification to notify the requestor when the assignment is closed.
- **Remind Worker** – Allows you to set the number of days after a state was last updated or this action was last run. Arena sends a reminder e-mail to the worker.
- **Send Assignment Reminder E-mail** – Allows you to create an email and set the dates prior and after the due date.
- **Send E-mail** – Allows you to set the e-mail notifications options for when a worker is e-mailed.
- **Set State** – Allows you to set the new state of an assignment.
- **Set State After Number Days** – Allows you to set the state after “x” days when a state was last updated.
- **Set State after Testing Field** – Allows you to set a state based upon a pre-determined value to decide what to do next.

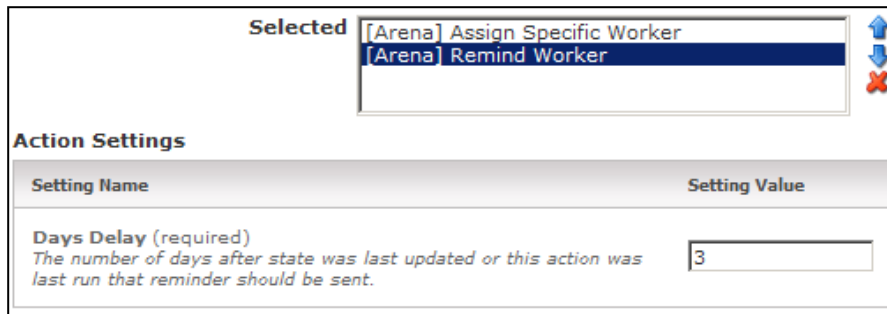
15) Click the add workflow  icon to add the workflow state to the **Selected** states.

Selected Workflow States



- 16) Based on the Workflow state selected, select or enter the **Action Settings** for the workflow state, as shown below.

Workflow State Action Settings



Selected

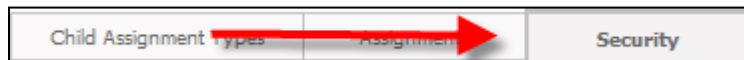
[Arena] Assign Specific Worker
[Arena] Remind Worker

Action Settings

Setting Name	Setting Value
Days Delay (required) <i>The number of days after state was last updated or this action was last run that reminder should be sent.</i>	3

- 17) Click **Save**.
- 18) Repeat steps 1 through 7 for additional workflow states for this Assignment Type.
- 19) Set security for this Assignment Type, similar to Tags. *This Assignment Type is now available on the Assignment Entry page.* Permissions are automatically set at the parent level for the user who creates the Assignment Type. If you create an assignment type on the child level, it will inherit parent level permissions. **See your Arena Administrator if the Security Tab is not available.**

Assignment Type Security



Child Assignment Types Assignment Security

CHILD ASSIGNMENT TYPES

The Child Assignment Types tab displays any assignment types you create under the parent assignment type.

Child Assignment Types

Child Assignment Types							
Assignments				Security			
Subscribe	Name	Owner	Active	# of Child Types	Assignments	Active	Past Due
<input type="checkbox"/>	Facility Repair	Adams, Allen					
<input type="checkbox"/>	Furniture / Moving	Adams, Allen					
<input type="checkbox"/>	Off Campus Requests	Adams, Allen					
Page: 1 of 1 Page Size: 133 Refresh 3 Assignment Type(s)							

- **Subscribe** – This box allows you to add a hyperlink to this Assignment on your Arena home page. Subscribers will receive an e-mail when assignments are created or updated. The option to e-mail when an assignment is closed is set on the Close Assignment workflow.
- **Name** – This is the name of the Assignment. *Click the name link to open the Assignment Type.*
- **Owner** – This is the owner of the Assignment. *Hovering over the person's name will display the person popup.*
- **Active** – This denotes if the Assignment is active or inactive .
- **# of Child Types** – This denotes the current number of all child Assignments associated with the Assignment Type.
- **Assignments** – This is the total number of Assignments, including all child Assignments. *This number includes open, closed and inactive assignments.*
- **Active** – This is the number of current active Assignments; that are still open. *The number includes all statuses except for closed.*
- **Past Due** – This is the number of Assignments that are past due, based on the Service Level Agreement (SLA) date.
- **Delete Button** – Click this to delete the Assignment Type. *This is available when no Assignments exist.*
- **Add Button** – Click this to create a new top level Assignment Type.
- **Export to Excel button** – Click this button to export the selected Assignment Types to Excel.

ASSIGNMENTS TAB

The assignments tab gives you the ability to filter through the statuses of current assignments as shown below.

Assignment List

Child Assignment Types Assignments Security

Priority ☐ Standard **State** ☐ Start ☐ Second

Worker Caleb Tucker

Include Child Types ☒ **Include Inactive** ☒

Title	Type	Requester	Worker	State	Priority	Created	Due Date	First Visit Date	Letter Sent
Sample Assignment #2	asdf	Johnson, Linda	Tucker, Caleb	Open	Standard	12/14/2009	12/18/2009		
Assignment Sample	asdf	Johnson, Linda	Tucker, Caleb	Open	Standard	12/14/2009	12/18/2009		
test for phone numbers	asdf	Johnson, Linda	Tucker, Caleb	Open	Standard	12/14/2009	12/18/2009		

Page: 1 of 1 Page Size: 151 3 Assignment(s)

[Email Requesters...](#) [Email Workers...](#)

- **Flags** – The colored flags indicate if the Assignment is current , almost late , or late .
- **Title** – This is the title of the Assignment.
- **Type** – This is the type of Assignment.
- **Requestor** – This is who made the request.
- **Worker** – This is whom is responsible for this Assignment.
- **State** – This is the state of the Assignment, if using Workflow States.
- **Priority** – This is the current Assignment status.
- **Created** – This is the date the Assignment was created.
- **Due Date** – This is when the Assignment is due.
- **Additional Columns** will display, if you are using Workflow States.
- **E-mail Requestors** – This link allows you to create an e-mail Communication to all requestors.
- **E-mail Workers** – This link allows you to create an e-mail Communication to all workers.
- The Add Assignment icon allows you to add an Assignment from this page, taking you to the Assignment Entry page.

ASSIGNMENT SECURITY TAB

Use this page, to set security permissions for each Assignment Type.

Assignment Security Tab

Child Assignment Types	Assignments	Security	
------------------------	-------------	----------	--

Current Permissions:

Stewie Administrator [person]	View, Edit, Edit Security
Jane Sample [person]	View, Edit People, Edit Security, Edit

Edit Security

Assignment Entry

The assignment entry page allows users to submit assignment requests, as shown below. *Due to the customization options, Assignment Entry pages may vary. The below example provides you with an example of several Custom Fields.*

Assignment Entry



Test Assignment Entry

description of the assignment--how it is to be used...

Title

Description

a description of this assignment.

Due Date

Requester

Jane Sample
[Change...](#) [Remove](#)

Priority

Urgent - Requests that keep several users from completing their work or requests that impact the success of an event.
Standard - Normal requests that need to be addressed as soon as possible. This should be the default for most requests.
High -

Worker

Sample Address

City , State Zip

Sample Area

Sample Checkbox

☒ Item A ☐ Item B ☐ Item C

Sample Query

Sample Date

Sample Document

Sample Document [Change...](#) [Remove](#)

Sample Lookup

Sample Person

Doe, John  

Sample Phone Number

ext.

Sample Radio List

☒ Item L ☐ Item M ☐ Item N

Sample Text Box



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Steps to Create a New Assignment Entry:

- 1) Select the Assignment Type from the Assignment Entry page.
- 2) Complete fields, as needed. *Due to the ability to use Workflow States and Custom Fields, your Assignment Entry page may vary.*

Assignment Entry

Sample Assignment Entry

Assignment Title	<input type="text"/>
Assignment Description	<div><div></div><div></div></div>
Requester	Linda Johnson Change... Remove
Priority	<div>Standard</div> <div>Urgent - Requests that keep several users from completing their work or requests that impact the success of an event. Custom not Urgent - Custom not Urgent Custom Urgent - Custom Urgent Critical - Requests that keep a single person from completing work. Standard - Normal requests that need to be addressed as soon as possible. This should be the default for most requests. Low - Requests for issues that can wait over a week or for suggestions for improvement.</div>
First Visit Date	<input type="text"/> 
Letter Sent	<input type="checkbox"/>
<div>Submit</div>	

- 3) Click **Submit**. *An e-mail is sent to the Worker.*

Steps to Update an Assignment:

- 1) Click the **link** from the Assignment e-mail.
- 2) Click **Edit Details**. *Fields may vary. If you choose the option to e-mail the requester when users make changes, an email is also sent when closing the assignment.*
- 3) Make the appropriate **changes**.
- 4) Click **Save**.

Assignment Details

Details about an assignment

Assignment Title

Assignment Description

Requester
[Jane Sample](#)
linda.johnson@arenachms.com
Main/Home (901) 757-2372

Assigned To
 [Other...](#)

Asgn. Type

Active ☒

State

Priority

Due Date

Training Topic ☒ Membership ☒ Groups ☒ Tags

New Note ☐ Add to Requester's Person Notes ☐ Private


History


Opened by Jane Sample 4/25/2010 7:30:56 PM
Edited by System 4/25/2010 7:30:56 PM
State changed from 'Assign Worker' to 'Open'

Steps to Close an Assignment:

- 1) Click the [link](#) from the Assignment e-mail or from the desktop hyperlink.
- 2) Click **Edit** to make any updates, or click **close** if no changes are necessary.

Closing an Assignment



Sample Assignment
 Assignment Details

Requester Jane Sample jane.sample@arenachms.com	Assigned To  Linda Johnson linda.johnson@arenachms.com
Main/Home (901) 757-2372 Business Cell	Asgn. Type Training Requests Status Open Priority Standard Due Date 7/31/2009 Name of individual to be trained Community Church Recommended day/time to train ASAP Please allow 3 days advance notice to schedule

History

Opened by Jane Sample 7/28/2009 8:26:02 PM
Assigned to Linda Johnson by Linda Johnson 7/28/2009 8:30:25 PM

Details about an assignment


test assignment
 test assignment

Resolution
 training is complete

Requester Jane SampleR linda.johnson@arenachms.com	Assigned To Jane Sample
Main/Home (901) 757-2372	Asgn. Type Training Active No State Closed (Since 5/25/2010 3:29 PM) Priority Standard Due Date 4/28/2010 Resolved 5/25/2010 3:29:27 PM Training Topic Membership,Groups,Tags

History

Opened by Jane Sample 4/25/2010 7:30:56 PM
Edited by System 4/25/2010 7:30:56 PM
 State changed from 'Assign Worker' to 'Open'
Edited by Jane Sample 5/21/2010 9:39:46 AM
 Worker changed from 'Linda Johnson' to 'Jane Sample'

Workflow


Once you create an Assignment with Workflow States, it will be available on the Person Detail page. Being that Workflows will vary, the example to follow includes the below States:

- Send a First Time Visitor letter by a Specific Worker.
- Send a reminder e-mail to the Specific Worker when the State is not changed within 2 days.
- Make a First Time Visitor Call by a Specific Worker.
- Send a reminder e-mail to the Specific Worker when the State is not changed within 2 days.
- Closing the Assignment.

Steps to Start a Workflow:

- 1) Go to the **Person Detail** page for whom you want to create an assignment.
- 2) Select the Workflow (Assignment) you would like to start for this person. This is not the person being assigned the Assignment, but the person for whom the Assignment is being done.

Start a Workflow

- 3) Click the Start Workflow  icon. The page will refresh and Arena will confirm the Workflow has begun, as shown below.

Workflow Confirmation




- 4) The worker selects the Assignment.

Active Workflow

Subscribed Tags		
Subscribed Groups		
My Assignments		
First Time Visitor Workflow		
First Time Visitor Workflow [Beulah Smith]	First Time Visitor Letter Reminder	Linda Johnson



- 5) Click Edit, once you are ready to make a State change.

Workflow Assignment

		First Time Visitor Workflow [Beulah Smith]	
Requester  Linda Johnson linda.johnson@arenachms.com		Assigned To Jane Sample linda.johnson@arenachms.com	
Main/Home Business (901) 757-2372 Business Fax Cell		Asgn. Type First Time Visitor Workflow Active Yes State First Time Visitor Letter Reminder (Since 2/18/2010 7:27 PM) Priority Standard Due Date 2/21/2010 Person Beulah Smith	
			
<input type="button" value="Edit"/> <input type="button" value="Close"/>			

- 6) Change the States, as needed for this Workflow.

Workflow State Change

Requester  Linda Johnson linda.johnson@arenachms.com		Assigned To <div> Jane Sample Other... </div>	
Main/Home Business (901) 757-2372 Business Fax Cell		Asgn. Type First Time Visitor Workflow Active <input checked="" type="checkbox"/> State First Time Visitor Assignment is Complete Priority Make First Time Visitor Call Due Date 2/21/2010 Person Beulah Smith  ...	
New Note <input type="checkbox"/> Add to Requester's Person Notes <input type="checkbox"/> Private			
Letter was mailed 2/18/2010			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

- 7) Click **Save**. The worker for the next State will receive an e-mail and repeat steps 4-7 until the Workflow is Complete.

GLOSSARY

Agent

An Agent is an automated program that performs specific Arena tasks (such as sending e-mail or geocoding addresses) at pre-defined intervals as a Windows Service. For more information, see the **Agents** Appendix in the *Arena Administrator Manual*.

Browser

A software program that enables you to view web pages.

Database

The entity that contains data in a structured format for data entry and retrieval. Arena uses SQL for its database structure. See also: *SQL*.

Domain

Indicates the logical or geographical venue of a web page. Common domains are .edu for education, .gov for government, .org for organizations and non-profits, .com for commercial.

Domain Name

Refers to the first part of a URL, including the domain and name of the host or Server computer.

Extension or File Extension

One of several letters at the end of a file name. Extensions usually follow a period (dot) and indicate the type of file. Common extensions are .txt for text, .exe for executable, .jpg for a picture file.

Firewall

Security measures designed to protect a networked system from unauthorized access.

Frames

A format for web documents that divides the page into segments, each with a scroll bar, as if it were a “window” within the window.

Frequency (Attendance Type)

An Attendance Type Frequency is the specific time that an Attendance Type is active and available for Check-In. It is also used in creating Occurrences generated by the Check-In application.

Geocoding

Geocoding is a process which provides the precise latitude and longitude coordinates of a street address, which is used by Arena for mapping and distance calculations.

Groups (also Small Groups)

Groups are one of the ways Arena is able to group and list members together.

Group Category

The Group Category acts as an overall assembly of all of the unique information for a set of groups such as the group member roles, group clusters, Cluster types/levels, etc.

Group Cluster Level

The Cluster Level refers to a specific level or tier within a particular Cluster Type.

Group Cluster Type (also Group Structure)

The Cluster Type is used to define different Group Tree structures within a Group Category.

Group Subscription

Group Subscriptions are used to track and easily view the count of Members or Pending Members of any Group. *See Also:* Tag Subscription

Group Tree

The Group Tree refers to the overall structure of a set of groups, often displayed and visualized as a tree due to its single root Cluster Type which then proceeds to branch multiple times (according to its Cluster Type) before the Small Group level.

Host (also Server)

The computer that provides web pages and documents to clients or users.

ID, Login (also Arena Login)

Login IDs are the Username and Password used to authenticate a login to Arena and to identify that user as a specific person in the Arena Database.

ID, Manager

Manager IDs are used by the Check-In Kiosk application. When entered in place of a Person ID, a Manager ID switches the Check-In Kiosk application to the Management page.

ID, Person

Person IDs are the way Arena identifies a person. Each person in the Database has a unique Person ID. Person IDs are also used by the Check-In Kiosk application. When a Person ID is entered at the main page, the associated person is selected from the database for Check-In.

Inactive

Inactivating an entity (Tag/Group, Tag/Group member, etc), unlike Deleting it, will not remove it from the database. This allows for historical data such as occurrences and attendance to be maintained.

Kiosk (Check-In)

A Check-In Kiosk is an automated location where persons can register their attendance for events. The kiosk application requires a PC with Windows 2000, XP or newer and a network connection to your Arena server. See also: Centralized Mode, Non-Centralized Mode, Secured, and Occurrence.

Kiosk Centralized Mode

The Centralized Mode of a Check-In Kiosk allows for a single kiosk to offer check-in for multiple Attendance Types, but cannot be used for Secured Attendance Types. See also: Kiosk, Non-Centralized Mode, Secured, and Occurrence.

Kiosk Non-Centralized Mode

The Non-Centralized Mode of a Check-In Kiosk can only be used to offer check-in for a single Attendance Type, and must be used for Secured Attendance Types. See also: Centralized Mode, Kiosk, Secured, and Occurrence.

Link

The web address embedded in a piece of text or image that directs the user to a specified address.

Lookup

Lookups are one of Arena's internal methods of storing frequently used values for fields. They are also used when a field should only have specific values available for selection. They are defined under Administration → Lookups.

Module

Modules, or Controls, are the person interfaces for data entry or data display throughout Arena.

Occurrence

Occurrences represent specific dates or times of instances or meetings of a Group, Tag, or Attendance Type.

Organization

This represents your company, entity or entities, and contains unique information and settings for each entity.

Report Server

The computer that runs and maintains the Microsoft Report Services application and website.

Role, Security

Security Roles are used to grant or limit access to areas of Arena. They can be assigned to persons or to groups, and are cumulative in nature.

Role, Group

Group Roles are used to indicate a group member's position and responsibilities. These are defined in Small Group Roles under **Administration → Lookups**.

Secured (Attendance Type Option)

The Secured option for an Attendance Type prevents the type from being used by a kiosk in Centralized mode. See also: Centralized Mode, Non-Centralized Mode, Kiosk, and Occurrence.

Site or Website

The term is used to mean "web page," but there is a difference. A web page is a single file that you might find on the Web. A site is the location that links several related pages.

SMS

Short Message Service (SMS) is a text messaging service component of phone, web, or mobile communication systems, using standardized communications protocols that allow the exchange of short text messages between fixed line or mobile phone devices.

SQL (Structured Query Language)

SQL (pronounced just like 'sequel') is an acronym for Structured Query Language, and is the database management system for Arena. SQL is used for adding, removing, and retrieving data.

SQL Server

The computer that runs and maintains the SQL databases and services.

Standardization

Standardization refers to the process of determining the correct postal code in a zip+4 fashion, verifying and setting the complete street address, and then verifying the whole address as a valid location.

Tags

Tags are one of the ways Arena is able to group and list members together. There are four default Tag types: Personal, Ministry, Serving and Event.

Tag Subscription

Tag Subscriptions are used to track and easily view the count of Pending/In Process, Critical (for Serving Tags), and Connected members of any Tag. *See Also:* Group Subscription

URL

The abbreviation for Uniform Resource Locator, the URL is the unique address of a web document.

Web Server

A computer running software, assigned an IP address, and connected to the Internet so that it can provide documents via the World Wide Web.

Widget

A visual object on the page that can be manipulated with the mouse and keyboard.